Chameleon Information Management Services Limited

INFOFLEX v5

WORK LIST MODULE USER GUIDE

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December 2014	2.14	5.60.0300	JW	Updates for 5.60.0300 Section 9 Summary views in panel layouts. 7.2.2 Copy summary options 3.1.1 Available for includes Screen Layouts.

CONTENTS

1 Introduction 5

1.1 Terminology 5

2 The Work List module 6

2.1 Work List Module Overview 7

3 Defining an Event View Summary 8

3.1 Overview of Event View Summary Definition 9
3.1.1 General Tab 10
3.1.2 Queries 11

3.2 Training Exercise – Create a New Event View Summary 12
3.2.1 Define the Event View Summary 12
3.2.2 Defining Queries 14
3.2.3 Completing the Summary Queries tab 16
3.2.4 Completing the Event View Summary definition 19
3.2.5 Defining Summary View groups 20
3.2.6 Setting the Default Event View Summary or Group 21
3.2.7 Test the Event View Summary in the Work List module 22

3.3 Pre-defined column widths 24
3.3.1 Defining Predefined Column Widths 25
3.3.2 Behaviour in Data Entry and Work List modules 28
3.3.3 Important Note 28

4 Using the Work List Module 29

4.1 Starting the module 29

4.2 Displaying data 30
4.2.1 Summary groups 31

4.3 How the grid works 32
4.3.1 (none) in the Query list 32
4.3.2 Default queries 32
4.3.3 Prompt queries 33
4.3.4 Grid functions 34

4.4 Exercise - Selecting data views, summary views and queries 35

4.5 The data entry screen 36

4.6 Editing data 37
4.6.1 Editing data in the grid 37
4.6.2 Editing data in the data entry screen 38

4.7 Exercise – Editing data 39
4.7.1 Editing data in the grid 39
4.7.2 Editing data in the data entry screen 40
4.7.3 Editing filter criteria data 40

4.8 Editing a subject in Data Entry 41

4.9 Exercise - Editing a subject in Data Entry 42

4.10 Refresh and Auto-refresh (Polling) 44
4.10.1 Manual refresh 44
4.10.2 Auto-refresh (Polling) 45

4.11 Viewing and generating documents in the Work List module .. 46
4.11.1 Exercise 49

5 Using Queries with Event View Summaries 50

5.1 Domains and Data Views 50
5.1.1 Using the Select button on the Summary Queries tab 50
5.1.2 Using the Select button on the Summary Queries tab 51
5.1.3 Item names in the Work List Grid 51

5.2 Multiple queries in an Event View Summary 52
5.2.1 Creating multiple queries 52
5.2.2 Viewing multiple queries in the Work List module 54

5.3 Prompt queries 55
5.3.1 Creating prompt queries 55
5.3.2 Viewing prompt queries in the Work List module 56

5.4 Editing data used by the query filter 56

5.5 Guidelines for creating queries 57

6 Conditional Formatting 59

6.1 Defining Conditional Formatting in Design Management 59
6.1.1 Defining the condition and formatting 59
6.1.2 Managing conditional formatting 61

6.2 Viewing Conditional Formatting in the Work List module 62
6.2.1 How conditional formatting is displayed 62
6.2.2 Multiple conditional formats 63
6.2.3 Editing data when Conditional Formatting is switched on 64
6.2.4 Other grid behaviour 64

6.3 Training Exercise – defining conditional formatting 65
6.3.1 Conditional formatting on query views 69

7 Menus and Toolbars 72

7.1 Toolbars 72
7.1.1 Work List toolbar 72
7.1.2 Summary toolbar 73

7.2 Menus 75
7.2.1 View menu 75
7.2.2 Summary menu 76
7.2.3 Event menu 77
7.2.4 Right click menu 77

8 Summary views in the Data Entry module 78

8.1 Displaying a summary view in the Data Entry module 78

8.2 Parent Event 81

8.3 Editing Data 82
8.3.1 Editing data in the grid 82
8.3.2 Editing data in the data entry screen 83

8.4 Adding a new event 84

9 Summary views in Panel Layouts 86

9.1 Design Management 86

9.2 Data Entry 89

1 INTRODUCTION

Work List and Patient Tracking provides an alternative way of viewing and working with data when the user needs to view a list of subjects or event views meeting certain criteria. This could be in order to monitor workflow or to update data in a particular event view. This module enables work lists to be defined according to user requirements, and provides subject lists for tracking and monitoring.

The module is intended for use with relatively small groups of subjects who each require the same action eg patients in a particular clinic whose results need to be updated. The module shows a grid of selected data items taken from one particular event. A series of queries controls which subjects are displayed. Work Lists can display data for viewing only or to allow editing.

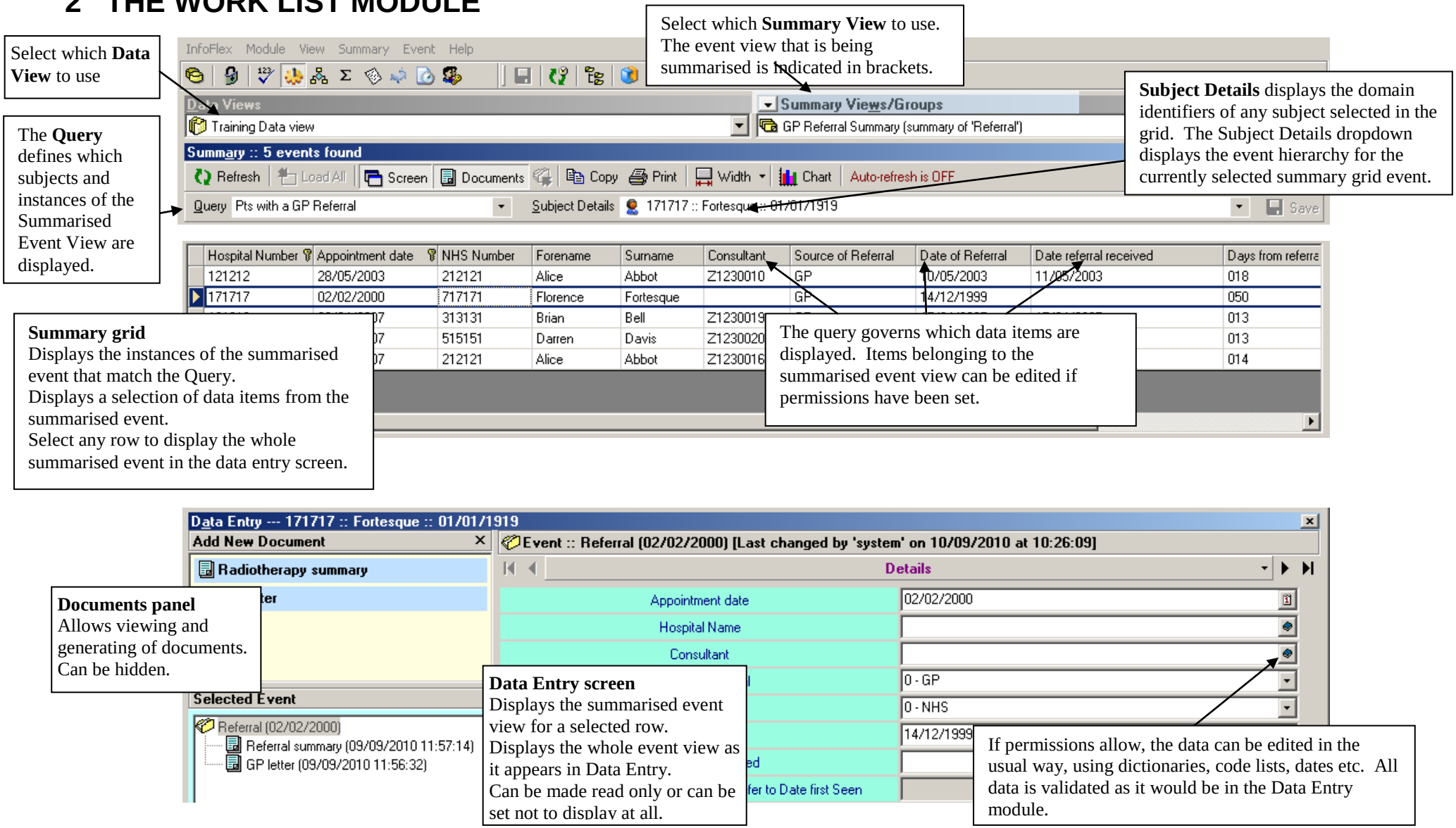
The mechanism can be used in the Data Entry module to view instances of repeated events for a single patient.

Work Lists can be defined for Data views and for Dictionary data views.

1.1 Terminology

Work List module	The module in which Event View Summaries are displayed.
Event View Summary	The definition created in Design Management which allows data to be displayed in the Work List module.
Summary View	The name given to an Event View Summary in the Work List and Data Entry modules.
Summary Grid	Displays the data defined by the query in the Work List module.
Summarised Event View	The primary event view from which data items are selected to be displayed in the grid. If the definition is set to allow **data viewing**, then an instance of the summarised event view can be selected in the grid and the whole event view can be viewed for that instance. If the definition is set to allow **data editing**, then in the grid data items from the summarised event view (and no other items) can be edited. Also when a row is selected in the grid, the whole event view is displayed in the data entry screen and all its data items can be edited.
Data Entry screen	on selection of a row in the grid, the data entry screen displays the whole summarised event view if the definition is set to data viewing or data editing.

2 THE WORK LIST MODULE


Select which **Data View** to use
Select which **Summary View** to use. The event view that is being summarised is indicated in brackets.
Subject Details displays the domain identifiers of any subject selected in the grid. The Subject Details dropdown displays the event hierarchy for the currently selected summary grid event.
The **Query** defines which subjects and instances of the Summarised Event View are displayed.
InfoFlex Module View Summary Event Help
Data Views
Training Data view
Summary Views/Groups
GP Referral Summary (summary of 'Referral')
Summary :: 5 events found
Refresh Load All Screen Documents Copy Print Width Chart Auto-refresh is OFF
Query Pts with a GP Referral
Subject Details 171717 :: Fortesque :: 01/01/1919
Save
Hospital Number Appointment date NHS Number Forename Surname Consultant Source of Referral Date of Referral Date referral received Days from referra
121212 28/05/2003 212121 Alice Abbot Z1230010 GP 10/05/2003 11/05/2003 018
171717 02/02/2000 717171 Florence Fortesque GP 14/12/1999 050
313131 Brian Bell Z1230019 013
515151 Darren Davis Z1230020 013
212121 Alice Abbot Z1230016 014
Summary grid
Displays the instances of the summarised event that match the Query.
Displays a selection of data items from the summarised event.
Select any row to display the whole summarised event in the data entry screen.
The query governs which data items are displayed. Items belonging to the summarised event view can be edited if permissions have been set.
Data Entry --- 171717 :: Fortesque :: 01/01/1919
Add New Document
Radiotherapy summary
Event :: Referral (02/02/2000) [Last changed by 'system' on 10/09/2010 at 10:26:09]
Details
Appointment date 02/02/2000
Hospital Name
Consultant
0 - GP
0 - NHS
14/12/1999
Selected Event
Referral (02/02/2000)
Referral summary (09/09/2010 11:57:14)
GP letter (09/09/2010 11:56:32)
Documents panel
Allows viewing and generating of documents.
Can be hidden.
Data Entry screen
Displays the summarised event view for a selected row.
Displays the whole event view as it appears in Data Entry.
Can be made read only or can be set not to display at all.
If permissions allow, the data can be edited in the usual way, using dictionaries, code lists, dates etc. All data is validated as it would be in the Data Entry module.

2.1 Work List Module Overview

The Work List module uses **Summary Views** as a means to view certain instances and certain data items of a **summarised event view**. Data items from the summarised event view are displayed in a grid to allow multiple event views to be viewed at once.

The **Work List and Patient Tracking** module has a simple layout with drop down lists controlling the data that is displayed. The layout allows the summary grid to occupy the entire width of screen and maximises the number of data items that can be displayed.

Queries are used to control which occurrences of the summarised event view are displayed, and which data items from the summarised event view are displayed. Data items from the summarised event view can be edited if you allow permission. Unlimited queries are definable allowing drilling in and out and viewing subjects from different perspectives (eg patients with a GP referral, patients with a non-GP referral etc). Data items from the summarised event view can be edited if you allow permission.

The screen has three main areas: **Menus and Toolbars**, **Summary Grid** and **Data Entry Screen.**

See the next page for an overview of how the Work List module works.

Then, go to **section 3** if you wish to define an Event View Summary,

or, go to **section 4** if you wish to learn more about using the Work List module.

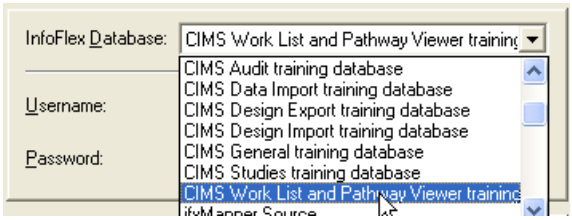
Note that the **Work List** module requires user permissions to be granted to each user.

3 DEFINING AN EVENT VIEW SUMMARY

This training course uses the **CIMS Work List and Pathway Viewer training database**. It assumes that you are already familiar with using InfoFlex and defining queries using the QDM (Query Design Manager) functions.

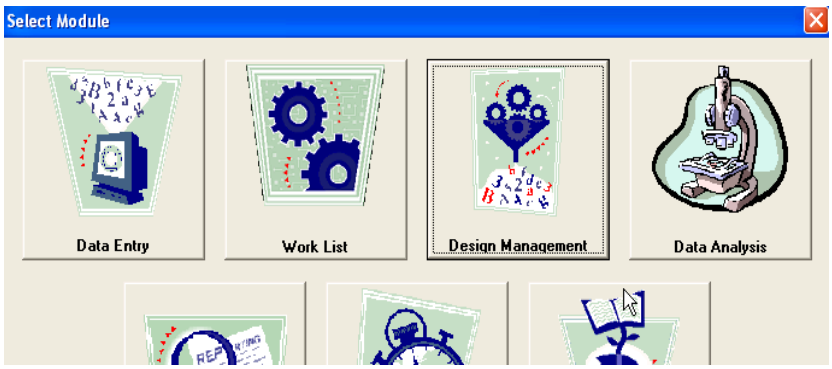
Before you can use the Work List module, you must first define an Event View Summary in the Design Management module.

➢ Log in the **CIMS Work List and Pathway Viewer training database**.

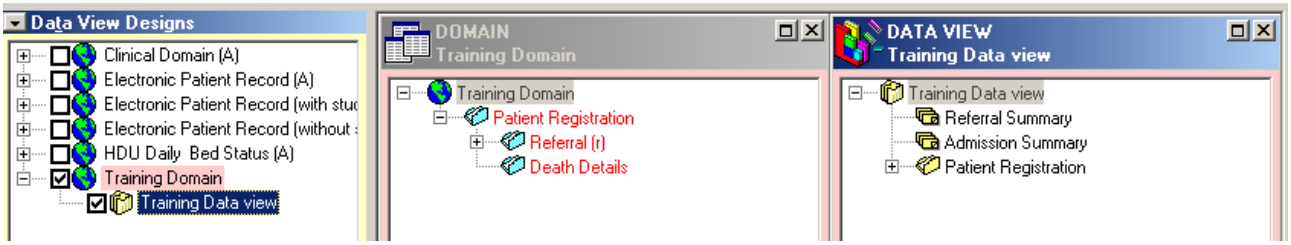

InfoFlex Database:
CIMS Work List and Pathway Viewer training
Username:
Password:
CIMS Audit training database
CIMS Data Import training database
CIMS Design Export training database
CIMS Design Import training database
CIMS General training database
CIMS Studies training database
CIMS Work List and Pathway Viewer training

The username is **training** and the password is **training**.

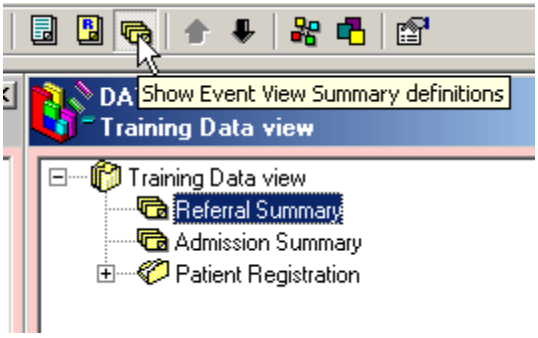
➢ Go to the **Design Management** module



➢ Display the **Training Domain** and the **Training Data view**

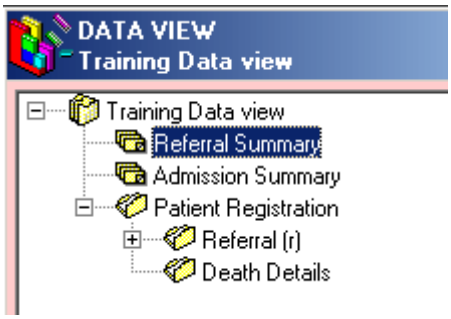


➢ Ensure the **Show Event View Summary definitions** button is switched on.

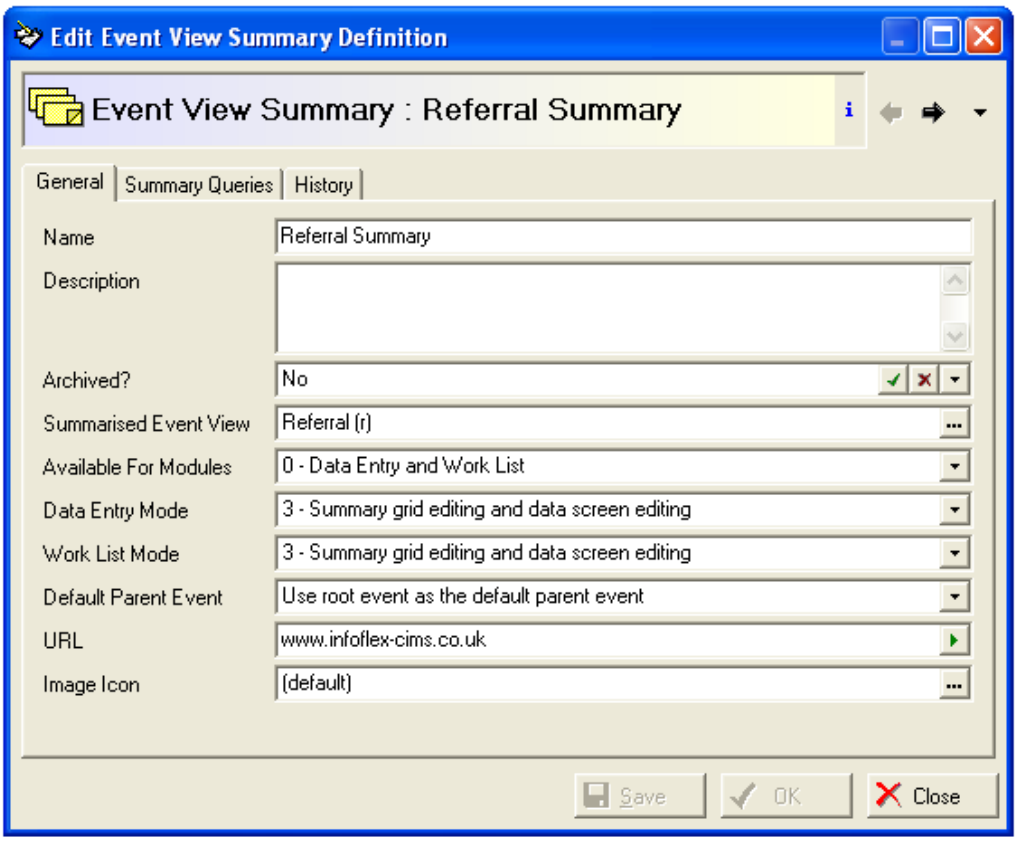


3.1 Overview of Event View Summary Definition

Event View Summaries are displayed at the top of the Data View tree, attached directly to the Data View definition (or the Dictionary view definition).



- Double click the **Referral Summary** to edit the Event View Summary definition.



3.1.1 General Tab

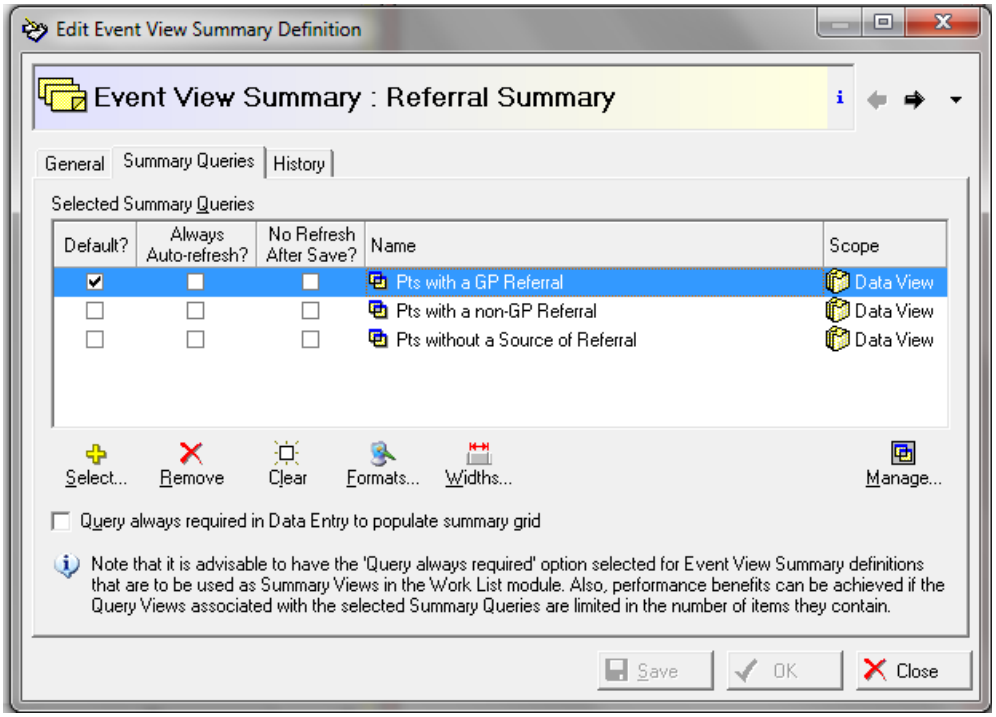
The following options are defined on the **General** tab.

Name	Each query must have a unique name.
Archived	Once the summary view has been defined, it must be **unarchived** to be made available.
Summarised Event View	The event view from which items will be displayed and editable. **You must choose an event view. The Summary View will not be available in the Work List module unless a valid (unarchived) Summarised Event View is selected here.**
Available For Modules	This option controls which module(s) the summary view definition can be displayed in. **1 - Data Entry**– the summary view will only be available in Data Entry **2 - Work List** – the summary view will only be available in Work List **3 – Screen Layouts** – the summary view will only be available in panel layout. Summary Views and associated queries for the Data Entry module can be designed differently. For Data Entry the summarised event view should be one that is likely to be repeated several times for one subject. Some queries are not appropriate for single subject.
Data Entry Mode **Work List Mode** **Screen Layout Mode**	These options control whether the data entry screen is displayed and whether data can be edited. Select a mode for each module the summary view is available in. **0 – Summary grid viewing only** – only the summary grid will be displayed, and the data cannot be edited. **1 – Summary grid viewing and data screen viewing** – the summary grid and the data entry screen will be displayed, but the data cannot be edited. **2 – Summary grid viewing and data screen editing** – the summary grid and the data entry screen will be displayed, but only the data screen can be edited. **3 – Summary grid editing and data screen editing** – both the summary grid and data entry screen will be displayed. Data can be edited in the summary grid or in the data entry screen.
Default Parent Event	This option is relevant only when the Summary View is used in the Data Entry module. Only the event views below the chosen parent event will be displayed. The two options are: **Use root event as the default parent event –** this will use the root event (i.e. Patient Registration) and all event views from this event down will be displayed. **Use currently selected event as the default parent event** – a list of possible parent events from the subject overview will be available and all event views below the selected parent event will be displayed.
URL	This allows you to enter a web address of your choice. It can be useful if you need to link information to this Event View Summary, e.g. policies and procedures
Image Icon	This allows you to change the Image Icon for the summary view in the Work List and Data Entry module screens. The default is .

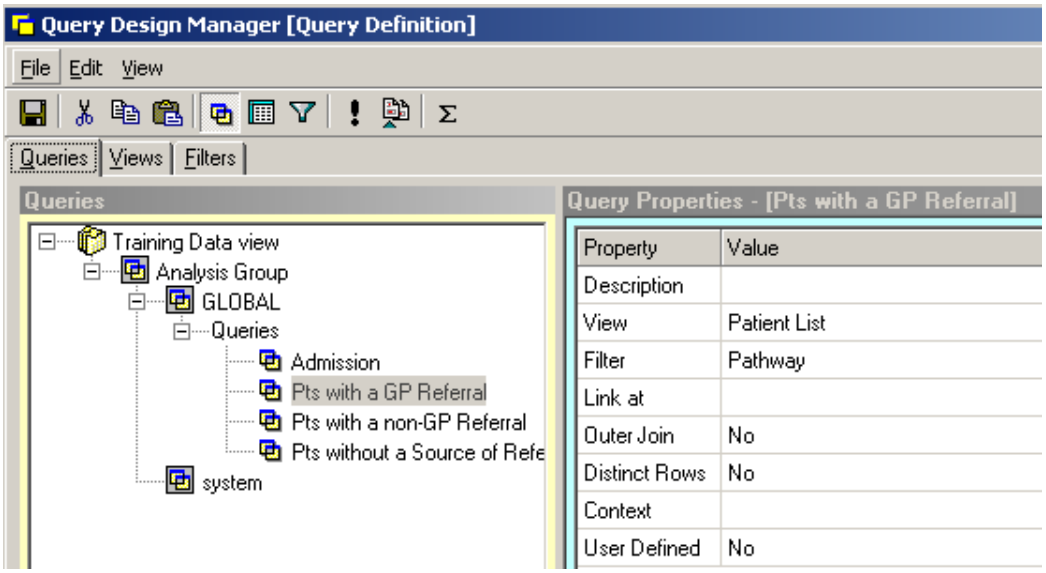
3.1.2 Queries

An **Event View Summary** can have multiple queries associated with it. The query definitions are used to filter the subjects and instances of the event views that are displayed in the module, and to define which items from the summarised event view are displayed. Ideally each query should display a manageable set of patients with something in common, whose records can then be processed.

➢ Select the **Summary Queries** tab to view the queries that have been defined:


Edit Event View Summary Definition
Event View Summary : Referral Summary
General
Summary Queries
History
Selected Summary Queries
Default?
Always Auto-refresh?
No Refresh After Save?
Name
Scope
Pts with a GP Referral
Pts with a non-GP Referral
Pts without a Source of Referral
Data View
Select...
Remove
Clear
Formats...
Widths...
Manage...
Query always required in Data Entry to populate summary grid
Note that it is advisable to have the 'Query always required' option selected for Event View Summary definitions that are to be used as Summary Views in the Work List module. Also, performance benefits can be achieved if the Query Views associated with the selected Summary Queries are limited in the number of items they contain.
Save
OK
Close

➢ Press the **Manage** button, to open the Query Design Manager (QDM) window where the query, view and filter can be viewed and edited in the usual way. (Note that on pressing **Manage**, a prompt message is displayed. Press **Yes** to edit queries defined in the data view).



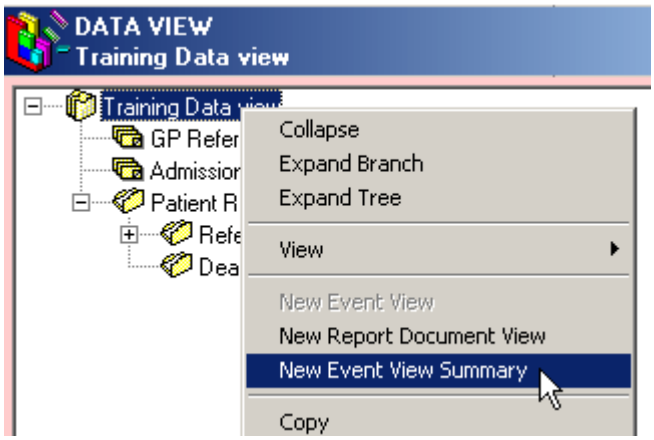
➢ Close the **QDM** and the **Event View Summary Definition** window.

3.2 Training Exercise – Create a New Event View Summary

In this example we shall create a Work List of patients for an Admissions clerk.

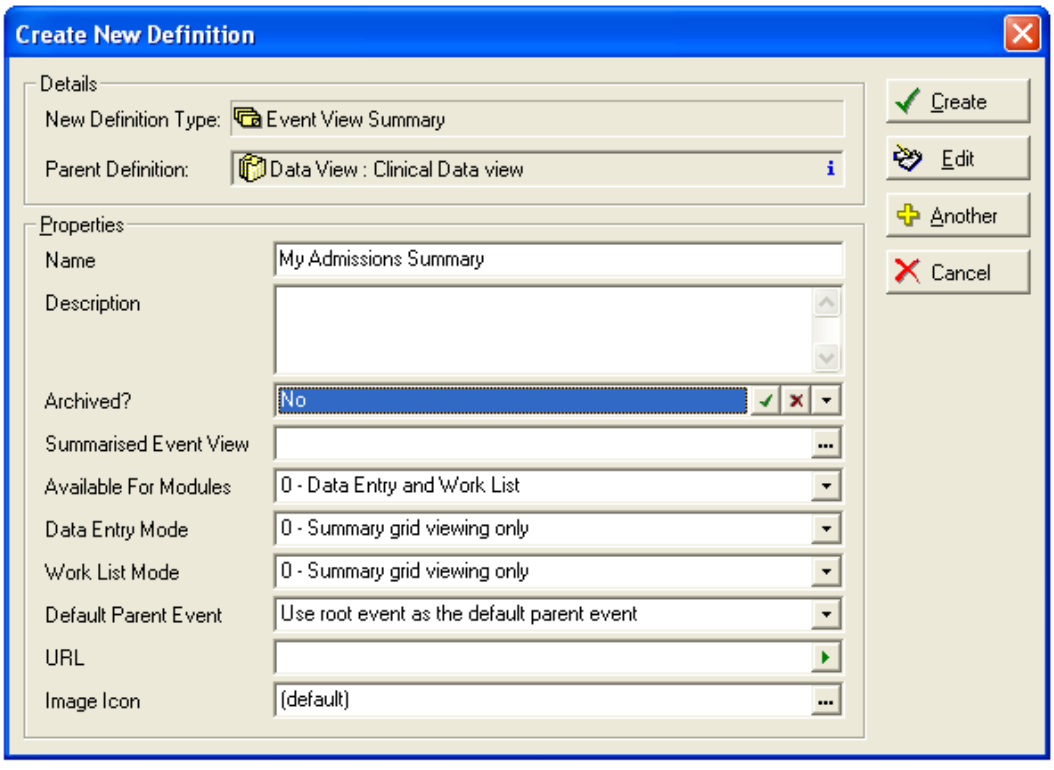
3.2.1 Define the Event View Summary

➢ Right click on the **Training** data view and select **New Event View Summary**.

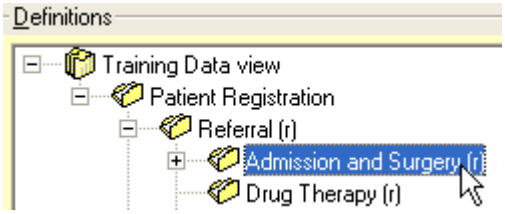


The **Create New Definition** window is displayed. The **Details** section of the window describes what is being created and the **Properties** section of the window displays the settings for the summary view being created.

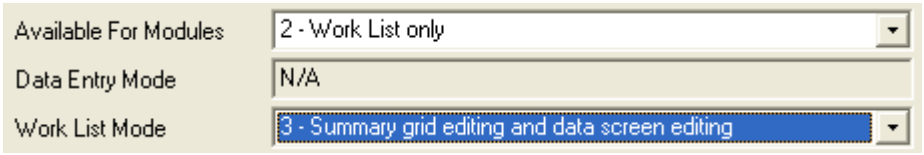
➢ Change the definition **Name** to **My Admissions Summary** and set the **Archive** status to **No**.

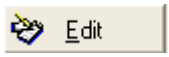


- In the **Summarised Event View** field select the **Admission and Surgery** event view.



- Change the **Available For Modules** to **2** and the **Work List Mode** to **3**.



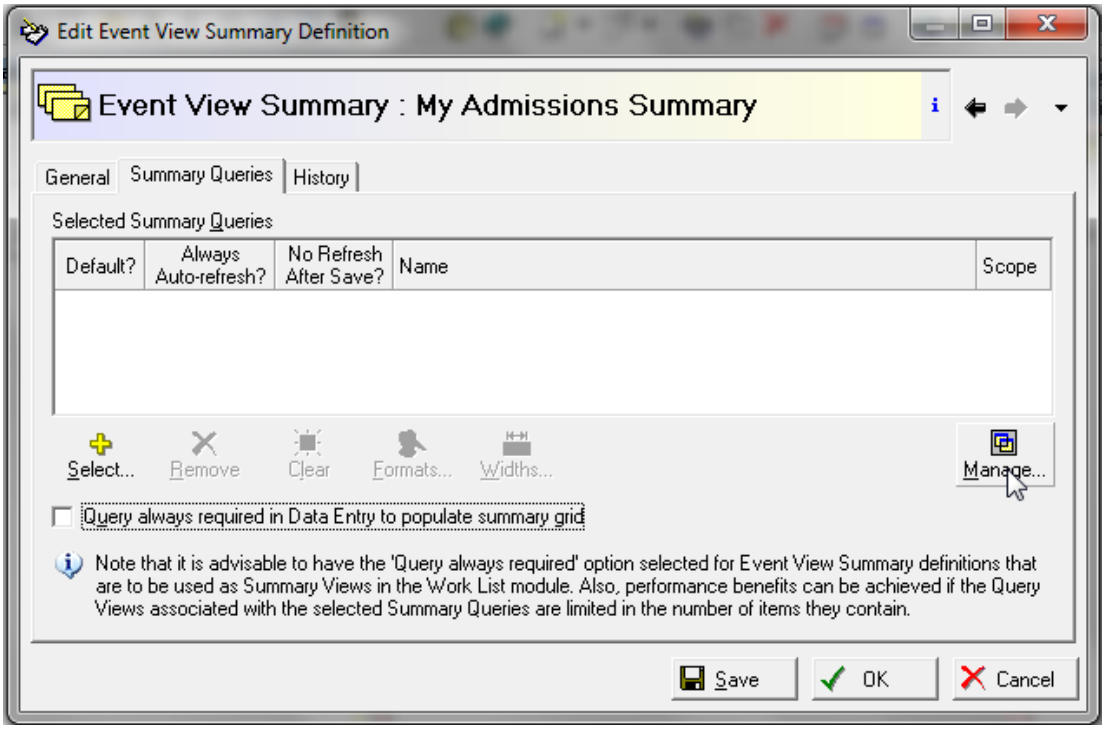
- Press the 

button to continue.

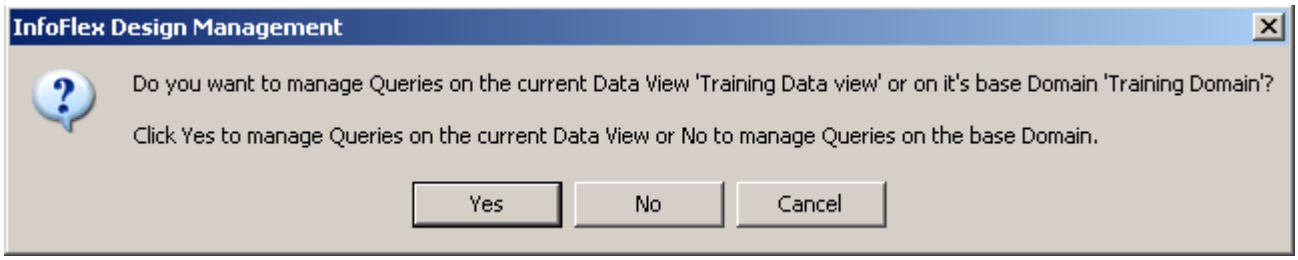
3.2.2 Defining Queries

➢ Go to the **Summary Queries** tab and press the

button to display the **Query Design Manager**.


Edit Event View Summary Definition
Event View Summary : My Admissions Summary
General
Summary Queries
History
Selected Summary Queries
Default?
Always Auto-refresh?
No Refresh After Save?
Name
Scope
Select...
Remove
Clear
Formats...
Widths...
Manage...
Query always required in Data Entry to populate summary grid
Note that it is advisable to have the 'Query always required' option selected for Event View Summary definitions that are to be used as Summary Views in the Work List module. Also, performance benefits can be achieved if the Query Views associated with the selected Summary Queries are limited in the number of items they contain.
Save
OK
Cancel

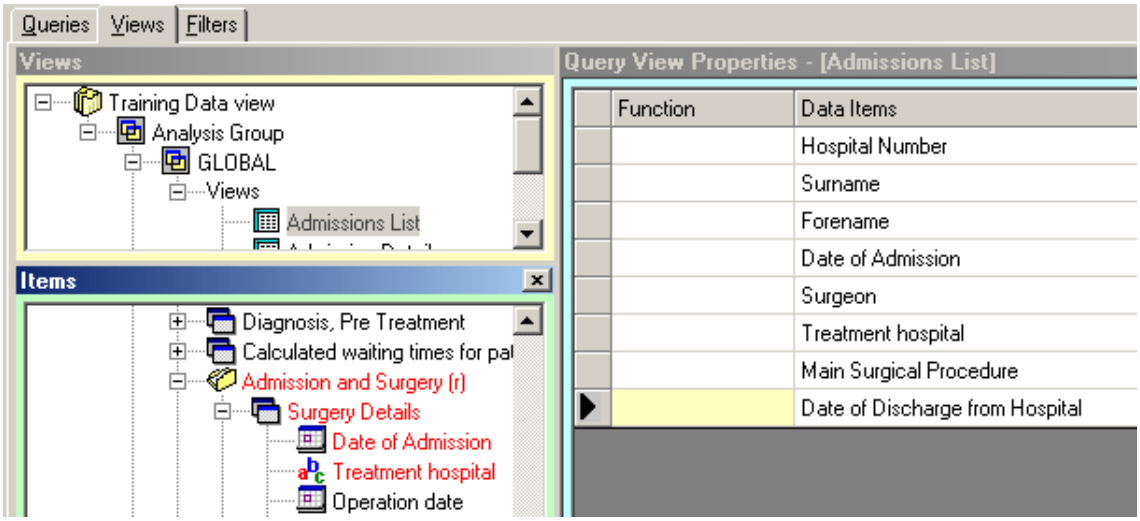
A prompt message is displayed asking if you wish to manage queries in the current Data View or in the Domain Analysis queries are defined in the data view, and Document and Subject Search queries are defined in the domain. You can choose where you would like to define your queries. When you associate queries with the event view summary (see below section 3.2.3) you can choose queries from both the domain and the data view.


InfoFlex Design Management
Do you want to manage Queries on the current Data View 'Training Data view' or on it's base Domain 'Training Domain'?
Click Yes to manage Queries on the current Data View or No to manage Queries on the base Domain.
Yes
No
Cancel

➢ In this case, press **Yes** to manage queries in the Data View.

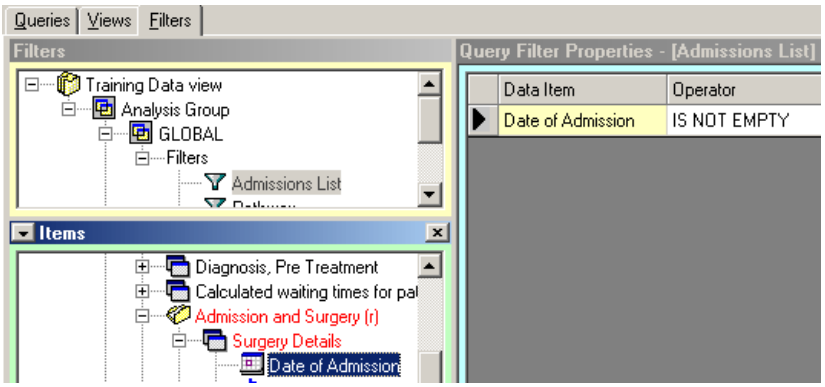
- Create a query view called **Admissions List**.

- Add the following data items:
  From Patient Registration: Hospital Number, Surname, Forename,
  From Admission and Surgery: Date of Admission, Surgeon, Treatment hospital, Main Surgical Procedure and Date of Discharge from Hospital.



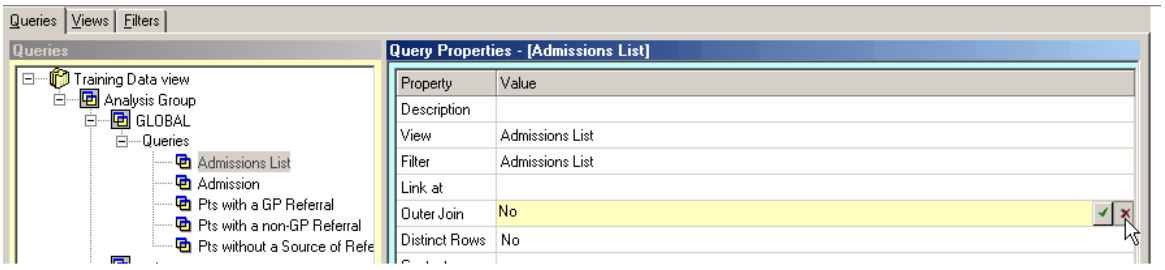
- **Save** the view.

- Create a query filter called **Admissions List** with criteria of **Date of Admission IS NOT EMPTY**.



- **Save** the filter.

- Create a query called **Admissions List** and select the **Admissions List** view and filter you have just defined. Change the **Outer Join** to **No**.



- **Save** the query and close the **QDM** window.

3.2.3 Completing the Summary Queries tab

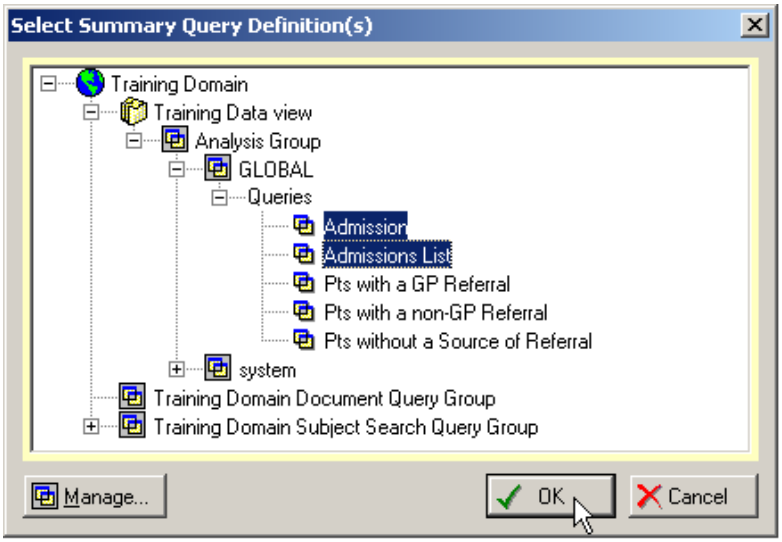
Now that you have created your query using QDM, you need to associate it with this Event View Summary.

➢ Press the

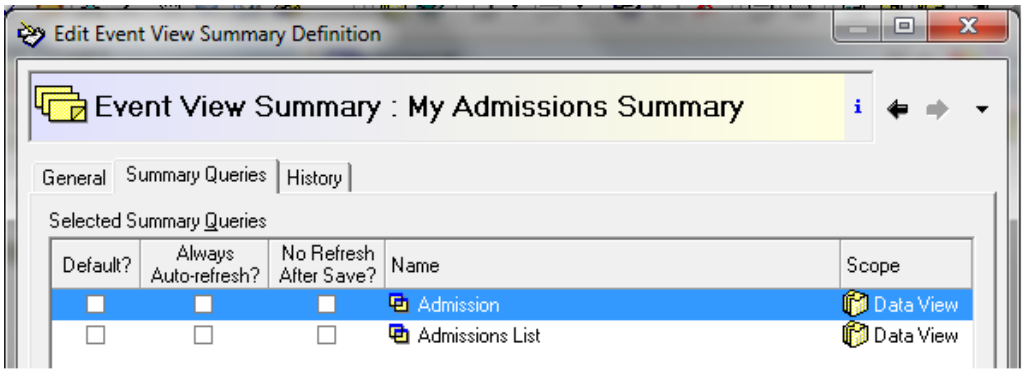
button on the **Summary Queries** tab.

The **Select Summary Query Definition(s)** window is displayed. You can select queries that have been defined in the data view (Analysis Group) or in the domain (Document Query Group and Subject Search Query Group).

➢ Navigate to the **Admissions List** query that you have just created. Hold the control key down and also select the **Admission** query then press the **OK** button.



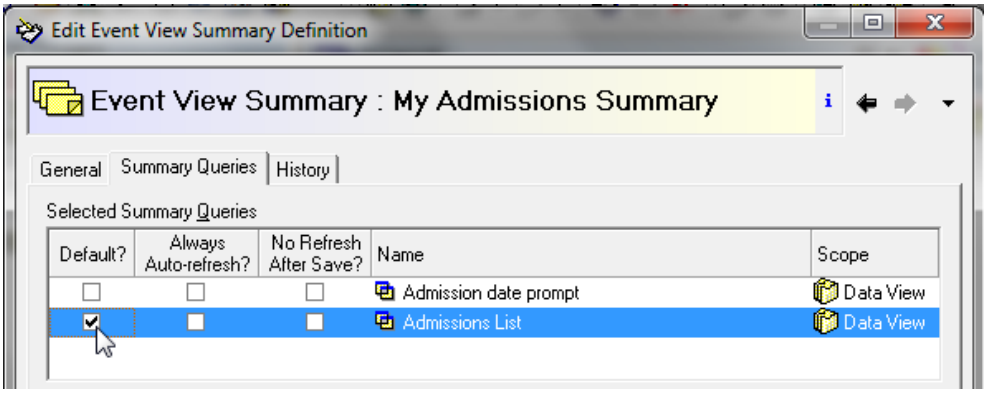
The queries are now listed on the **Summary Queries** tab and will be available in the Work List module when the **Admissions Summary** summary view is selected.



3.2.3.1 Default queries

If you set a default query, then that query is displayed by default whenever you select that summary view in the Work List module.

➢ Click the **Default** check box against the **Admissions List** query. The **Admissions List** query will now be displayed by default whenever the **My Admissions Summary** summary view is selected in the Work List module.



Note that you can define several queries to be associated with an Event View Summary, but only one can be set as the Default.

If no default query is set for an Event View Summary, then on displaying the summary view in the Work List module, the query dropdown will display either **(none)** or nothing at all, depending on the setting described in the section 3.2.3.2 below.

3.2.3.2 Query always required in Data Entry to populate summary grid

This option on the **Summary Queries** tab controls whether the option **(none)** is available in the dropdown list of queries in the Work List module. The **(none)** option displays all instances of the summarised event view which could be a large and (and therefore difficult to manage) number of events.

If this option ticked, then **(none)** will not be available in the dropdown list.

If this option is ticked and there is no default query set, then on displaying the Summary view, nothing at all is selected in the query dropdown list and the grid remains empty until a query is selected.

See below sections 4.3.1 and 4.3.2 for details of how these options look in the Work List module.

3.2.3.3 Always Auto-refresh?

This option on the **Summary Queries** tab controls how the Auto-refresh function behaves. When the Auto-refresh function is switched on, then if **Always Auto-refresh?** is switched on for a query then the grid will automatically refresh after the polling interval has passed.

However, if the Auto-refresh function is switched on but **Always Auto-refresh?** is switched off for a query, then when the polling interval has passed, the grid will only be refreshed if relevant data has been changed by other users. This means that the user does not have to wait unnecessarily for the grid to be refreshed if there are no changes. However, calculations in queries (for example date/time calculations in a view or filter) will not be reprocessed.

3.2.3.4 No Refresh After Save?

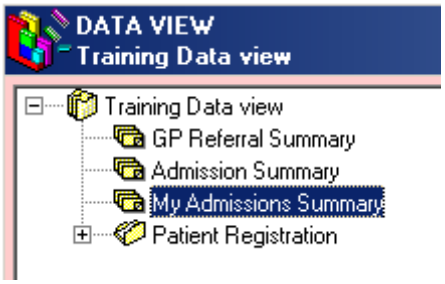
This option controls whether the summary grid gets reloaded after saving the currently selected event. Tick the option if you do **not** wish the grid to be refreshed after saving

In Work List or Data Entry, if a query with this option set is displayed then the summary grid will **not** be automatically reloaded after saving changes to the currently selected event. Even though the summary grid is not reloaded the cells marked as changed **will** be updated so that they are no longer marked as changed.

3.2.4 Completing the Event View Summary definition

- **Save** the event view summary and **Close** the definition window.

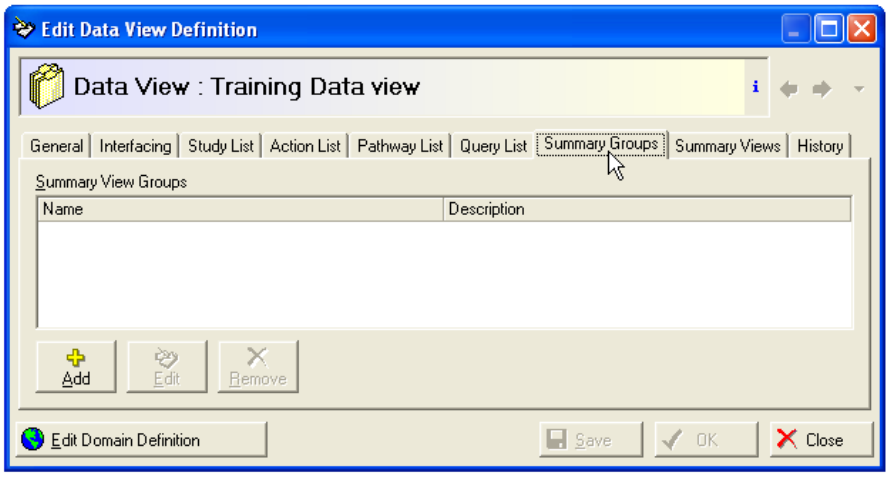
The **My Admissions Summary** event view summary is displayed in the data view tree.



3.2.5 Defining Summary View groups

It is possible to group summary view definitions together to allow users to switch between work lists within a group using tabs in the Work List module. The query is retained between tabs so that it is quick and easy to go from one work list to another.

To create, edit or remove summary view groups, edit the data view definition and go to the **Summary Groups** tab.

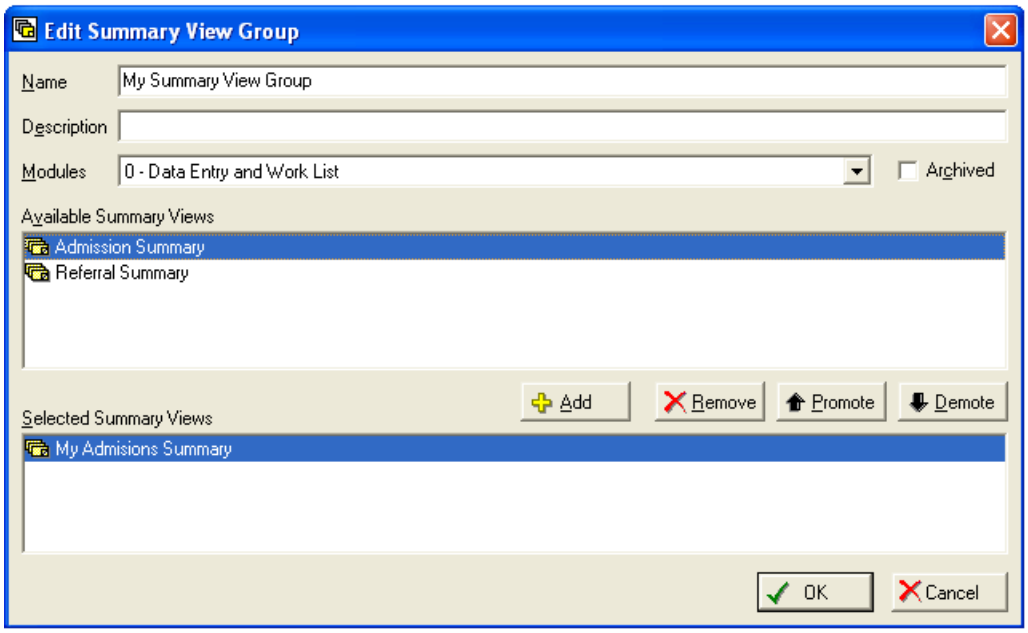


To add a new Summary View Group press the **Add** button. The **Add New Summary View Group** dialog is displayed.

Summary view group definitions have the standard **Name**, **Description** and **Archived** properties.

The **Available Summary Views** pane shows the Summary Views available in the current data view. To add a summary view to the group, double-click it or select the summary view and press the **Add** button.

The **Selected Summary Views** pane shows summary views that have been selected for the group.



The order of the Summary Views in the group can be changed using the **Promote** and **Demote** buttons. You should order the summary views the same order that their tabs need to be displayed in the Work List module.

Summary Views can be removed from the group using the **Remove** button.

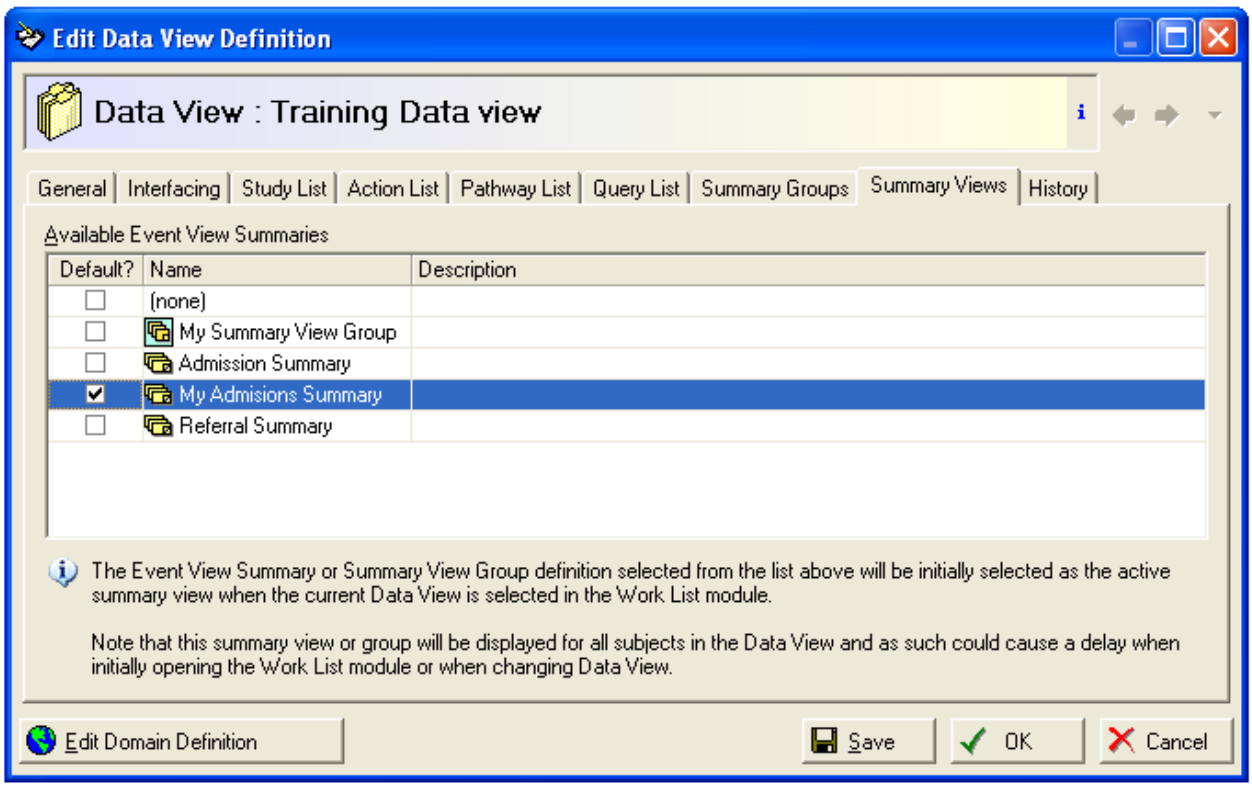
Summary View Group definitions can be assigned to the Data Entry module or to the Work List module or both. This setting must be consistent with the settings in the Summary Views themselves. For example if an individual Summary View is set to be seen in **Worklist only**, then it will not be visible in a Summary View Group which is set to be seen in **Data Entry only**.

3.2.6 Setting the Default Event View Summary or Group

A default event view summary or group for the data view can be set. This event view summary or group will be displayed whenever the data view is selected in the Work List module. If a group is selected to be the default, then that group and the first summary within that group will be displayed whenever the data view is selected.

➢ Open the data view definition for the **Training** data view and go to the **Summary Views** tab.

➢ Tick one of the summaries or groups. This summary and/or group will now be displayed by default whenever the Training data view is selected in the Work List module.


Edit Data View Definition
Data View : Training Data view
General
Interfacing
Study List
Action List
Pathway List
Query List
Summary Groups
Summary Views
History
Available Event View Summaries
Default?
Name
Description
(none)
My Summary View Group
Admission Summary
My Admisions Summary
Referral Summary
The Event View Summary or Summary View Group definition selected from the list above will be initially selected as the active summary view when the current Data View is selected in the Work List module.
Note that this summary view or group will be displayed for all subjects in the Data View and as such could cause a delay when initially opening the Work List module or when changing Data View.
Edit Domain Definition
Save
OK
Cancel

➢ **Save** and **Close** the data view.

3.2.7 Test the Event View Summary in the Work List module

➢ Press to go to the Work List module.

➢ Ensure the **Training** Data view is selected.

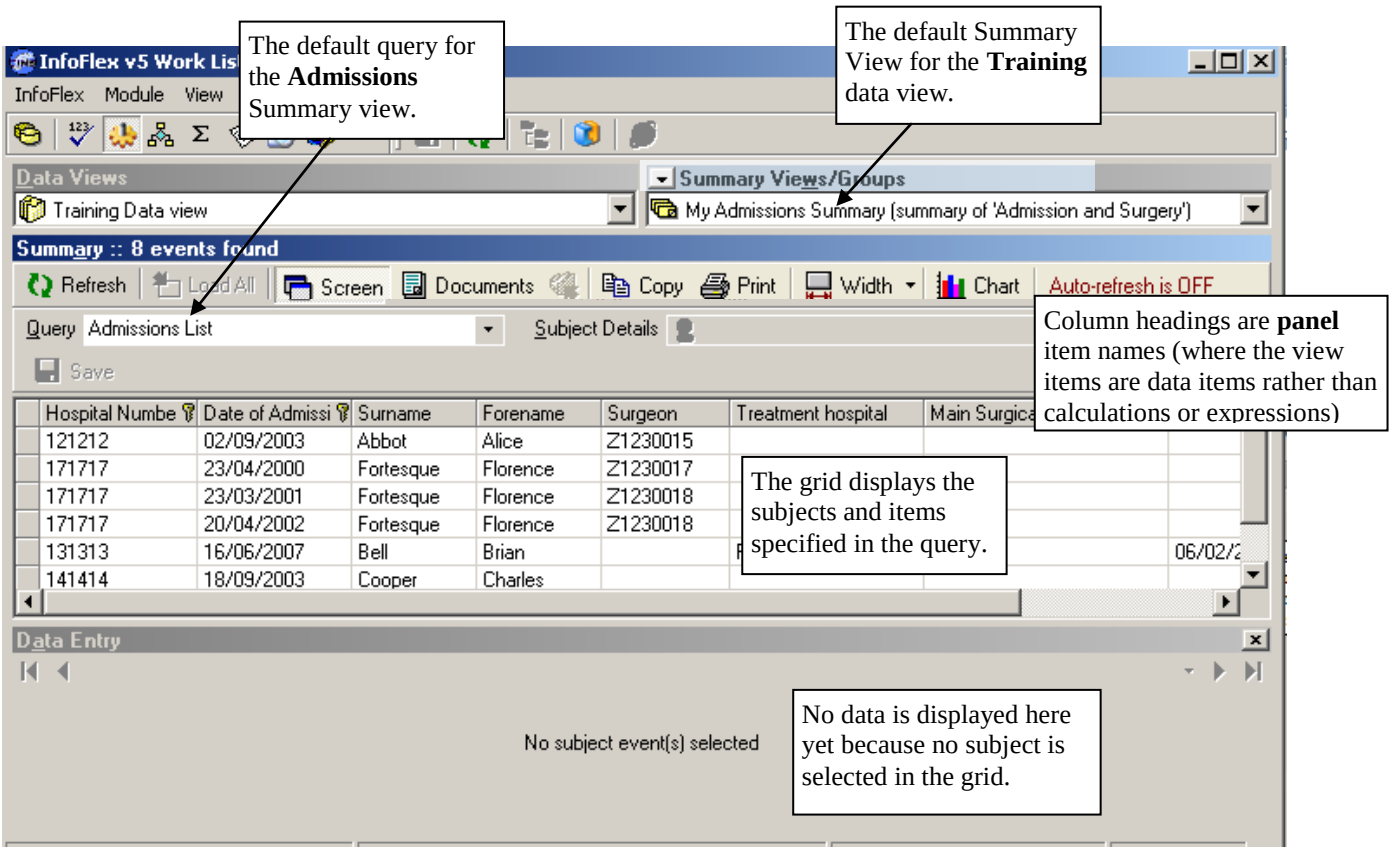
Note that **Event View Summaries** are known as **Summary Views** in the Work List module.

The **My Admissions Summary** summary view is displayed automatically because it is set as the default Summary View for the **Training** data view.

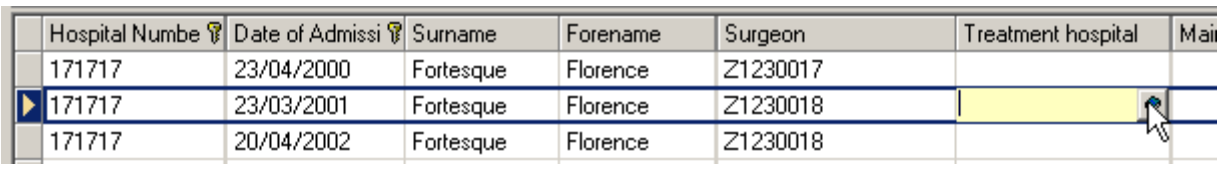
The **Admissions List** query is displayed automatically because it is set as the default query for the **Admissions** summary view.

The **grid** displays the subjects and data items specified in the Admissions List query.

The **Data Entry screen** displays nothing because no subject is yet selected in the grid.

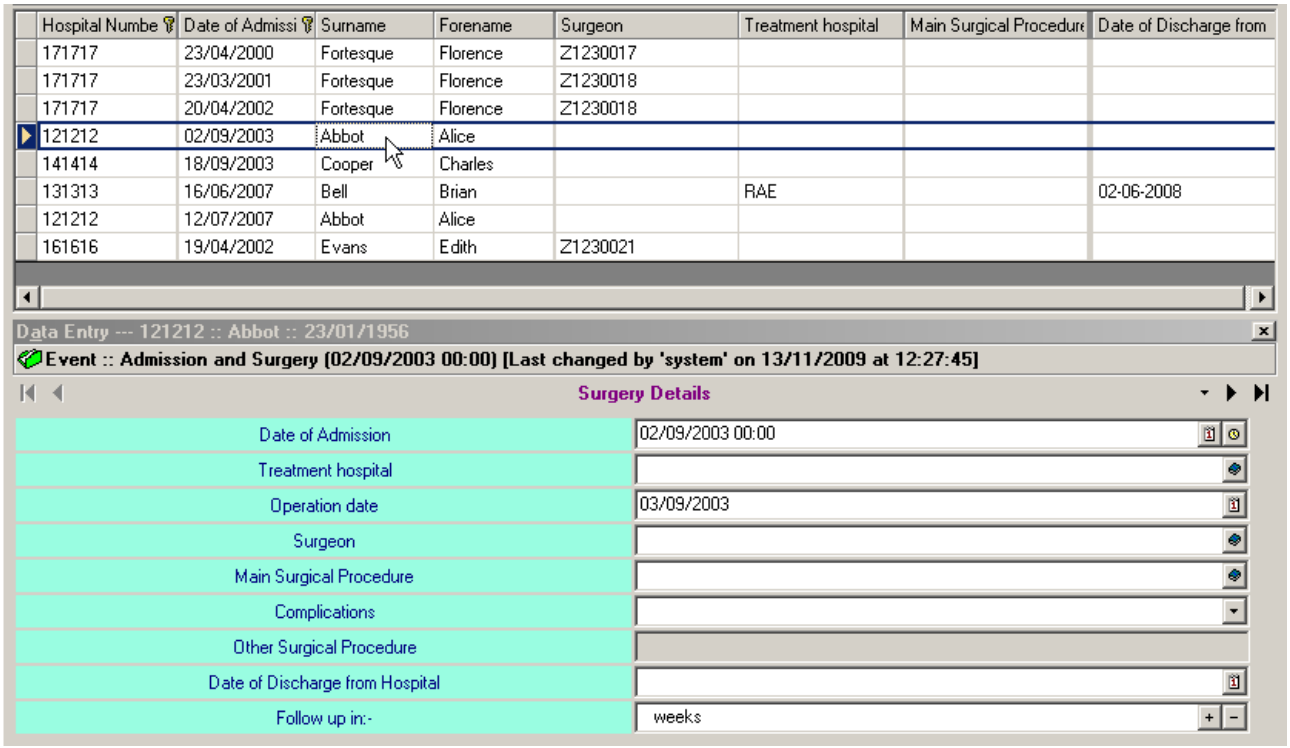

The default query for the **Admissions** Summary view.
The default Summary View for the **Training** data view.
InfoFlex v5 Work List
InfoFlex Module View
Data Views
Training Data view
Summary Views/Groups
My Admissions Summary (summary of 'Admission and Surgery')
Summary :: 8 events found
Refresh Load All Screen Documents Copy Print Width Chart Auto-refresh is OFF
Query Admissions List
Subject Details
Save
Hospital Numbe | Date of Admissi | Surname | Forename | Surgeon | Treatment hospital | Main Surgica
121212 | 02/09/2003 | Abbot | Alice | Z1230015
171717 | 23/04/2000 | Fortesque | Florence | Z1230017
171717 | 23/03/2001 | Fortesque | Florence | Z1230018
171717 | 20/04/2002 | Fortesque | Florence | Z1230018
131313 | 16/06/2007 | Bell | Brian
141414 | 18/09/2003 | Cooper | Charles
Column headings are **panel** item names (where the view items are data items rather than calculations or expressions)
The grid displays the subjects and items specified in the query.
Data Entry
No subject event(s) selected
No data is displayed here yet because no subject is selected in the grid.

➢ Click in a row in the grid and check that you can edit any data items that belong to the Admission event view.


Hospital Numbe | Date of Admissi | Surname | Forename | Surgeon | Treatment hospital | Mai
171717 | 23/04/2000 | Fortesque | Florence | Z1230017
171717 | 23/03/2001 | Fortesque | Florence | Z1230018
171717 | 20/04/2002 | Fortesque | Florence | Z1230018

- Select a row in the grid.

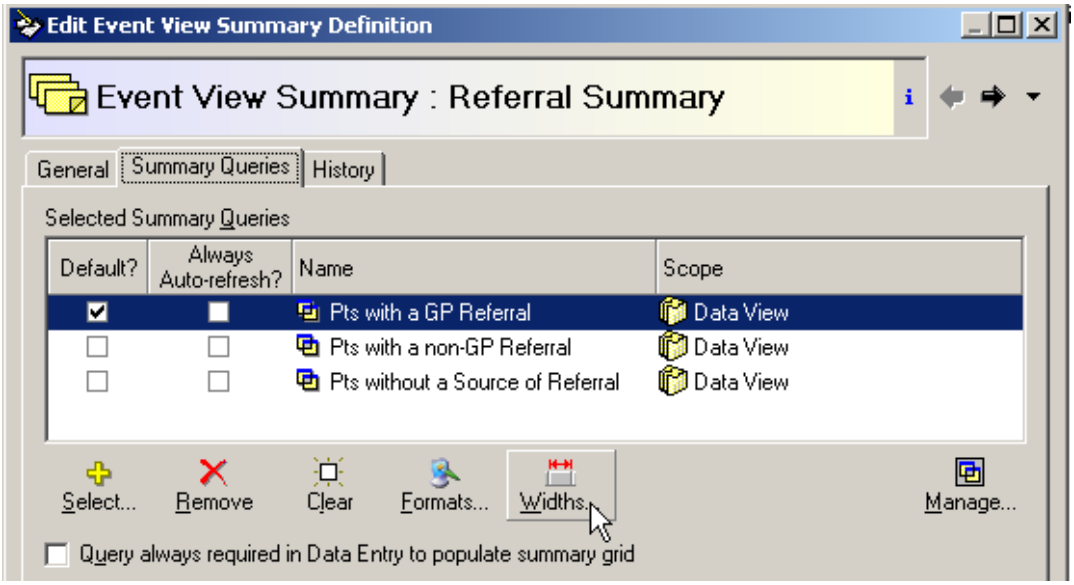
The Data Entry Screen now displays the whole Admissions event view for the row you have selected.
Because the Event View Summary definition is set to allow data editing, the Admissions event view in the Data Entry screen can be edited and saved in the same way as it can in the Data Entry module.



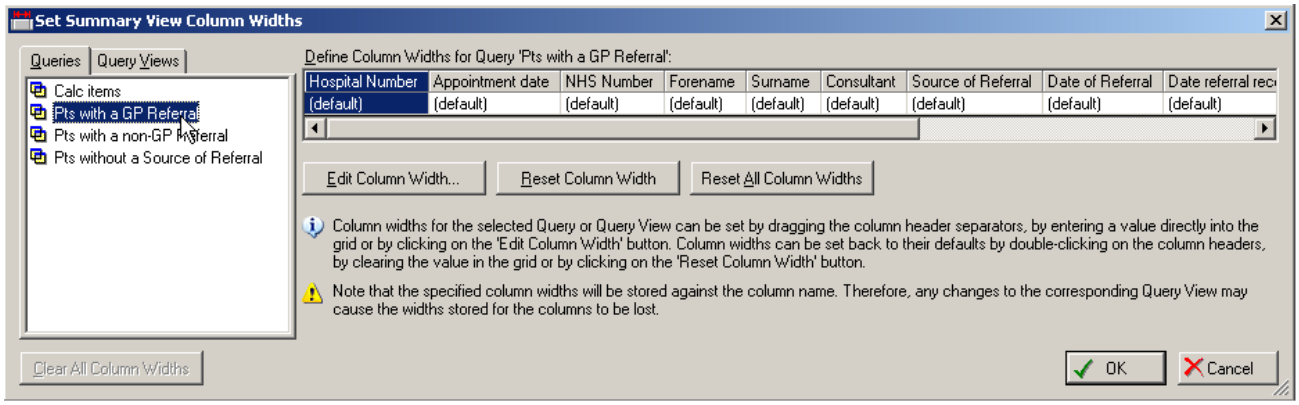
3.3 Pre-defined column widths

It is possible to predefine column widths for the summary queries associated with Event View Summary Definitions. These predefined column widths are applied to summary views in both the Data Entry and Work List modules.

In Design Management, the **Summary Queries** tab of the **Edit Event View Summary Definition** window contains a **Widths** button. This button is only enabled when one or more queries have been selected for the Event View Summary definition.



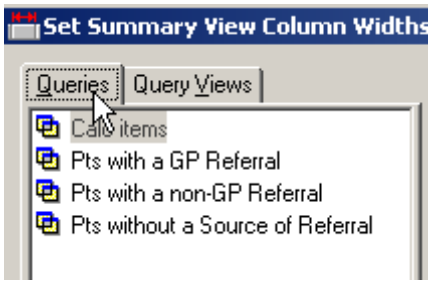
Clicking on this button opens the **Set Summary View Column Widths** window.

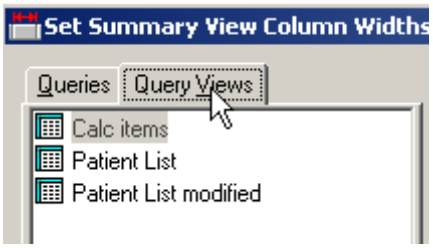

Set Summary View Column Widths
Queries
Query Views
Calc items
Pts with a GP Referral
Pts with a non-GP Referral
Pts without a Source of Referral
Define Column Widths for Query 'Pts with a GP Referral':
Hospital Number
Appointment date
NHS Number
Forename
Surname
Consultant
Source of Referral
Date of Referral
(default)
Edit Column Width...
Reset Column Width
Reset All Column Widths
Column widths for the selected Query or Query View can be set by dragging the column header separators, by entering a value directly into the grid or by clicking on the 'Edit Column Width' button. Column widths can be set back to their defaults by double-clicking on the column headers, by clearing the value in the grid or by clicking on the 'Reset Column Width' button.
Note that the specified column widths will be stored against the column name. Therefore, any changes to the corresponding Query View may cause the widths stored for the columns to be lost.
Clear All Column Widths
OK
Cancel

You can choose to set the column widths for an individual query, or you can set the column widths for a query view. If you set the widths for a query view, then the widths will be applied to all queries using that query view as long as the query has not had its own widths defined.

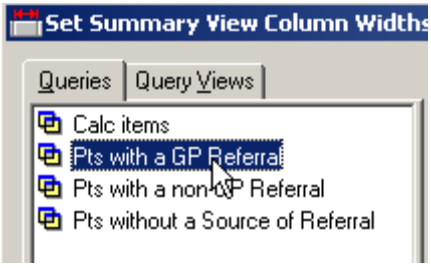
3.3.1 Defining Predefined Column Widths

To set column widths for a query, choose the **Query** tab, and to set widths for a query view, choose the **Query Views** tab.

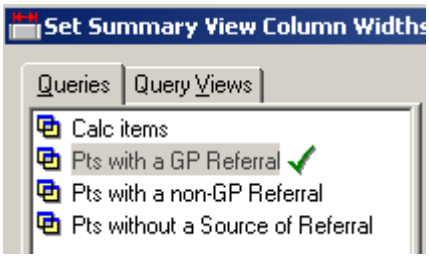




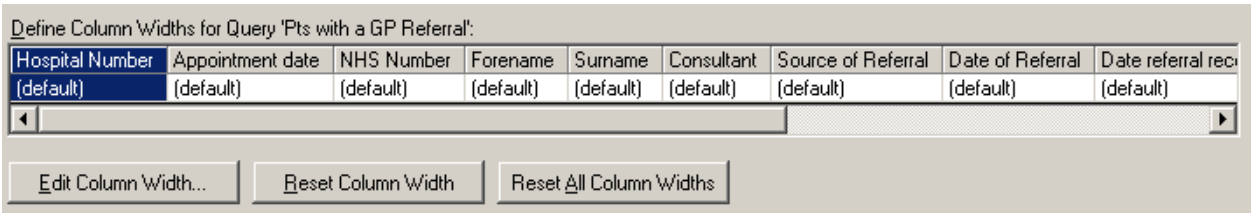
To define the column widths, select the query or query view from the relevant tab.



Note that a green tick against a query or query view indicates that column widths have already been defined for that query or query view. If widths have already been defined, you can still amend the widths.



When you select a query or query view, the grid displays the columns that will be displayed in the Work List or Data Entry modules when that query is selected.



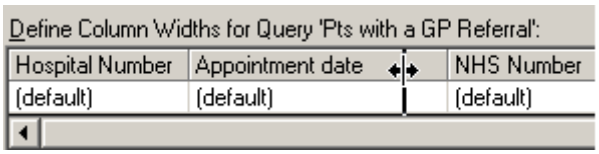
The row beneath the column headings displays (default) for each column. This indicates that no column widths have yet been defined and therefore the column width in Work List or Data Entry will be determined depending on the contents of the cells in the column.

Setting column widths

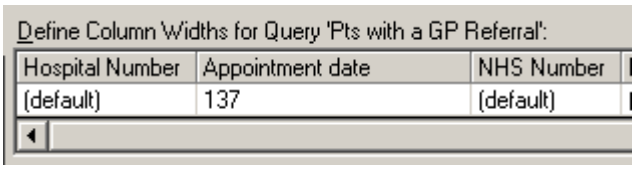
You can set the column width using any of the following methods:

1 Drag the column separator

Pick up the separator between two column headings and drag it to the left or right.

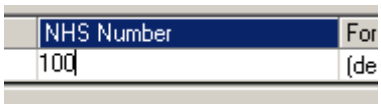


When you drop it, the cell beneath the column heading displays the width of the column in pixels, and the column remains at the width you have selected.



2 Type in a number

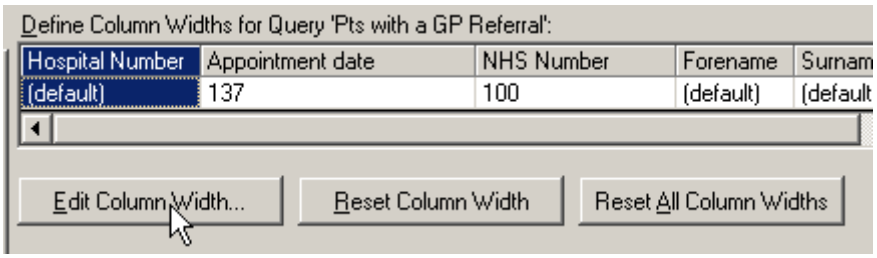
Click in the cell beneath a column heading and type a number which represents the width of the column in pixels.



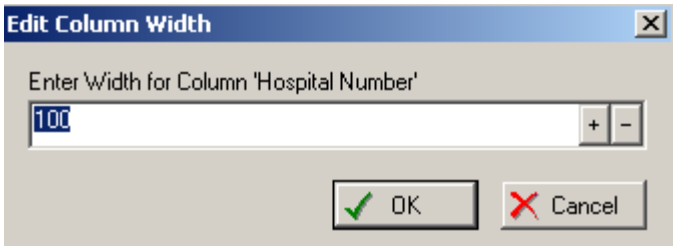
When you press return, the column width changes to the width you have entered.
(Note that the minimum width is 16 pixels. There is no maximum width).

3 Press the **Edit Column Widths** button

Select a cell then press the Edit Column Width button.



Enter the width of the column in pixels then press OK.



When you press OK, the column width in the grid changes to the width you have entered.

Resetting to the default width

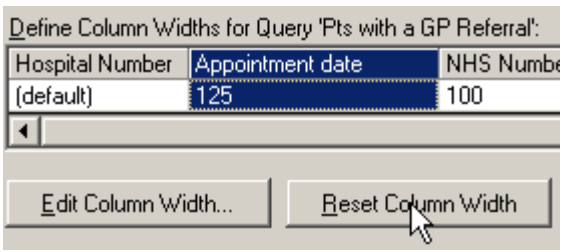
You can reset a predefined width to the default (which means that the column width in Work List or Data Entry will be determined depending on the contents of the cells in the column) using any of the following methods:

1 Double-click a column heading

If you double click a column heading, the width for that column only will be reset to (default).

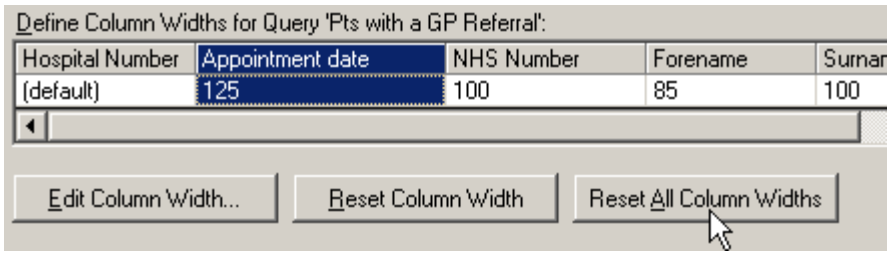
2 Press **Reset Column Width**

Select a column width then press the Reset Column Width button. The width for that column only will be reset to (default).

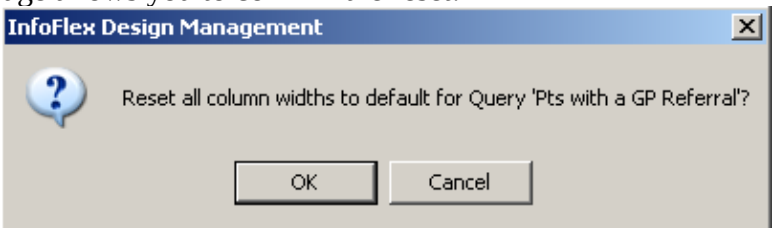


3 Press **Reset All Column Widths**

If you wish to set all the column widths in the currently selected Query or Query View, then press the Reset All Column Widths button.

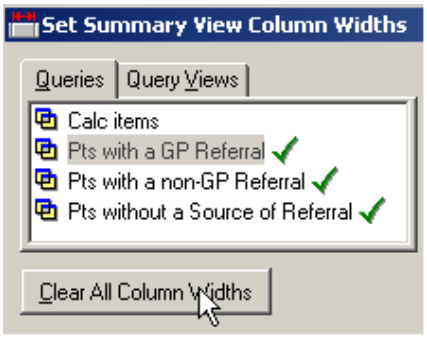


A prompt message allows you to confirm the reset.

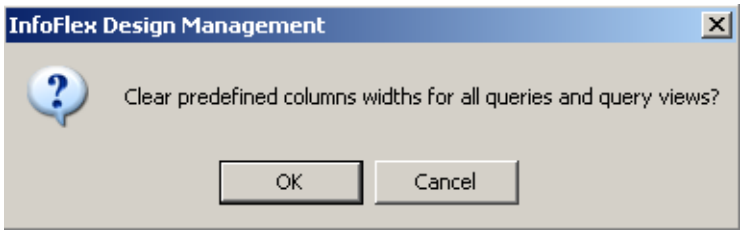


4 Press **Clear All Column Widths**

The Clear All Column Widths button clears all the column widths that have been defined for all the queries and query views in the current Summary View.



A prompt message allows you to confirm the clear.



3.3.2 Behaviour in Data Entry and Work List modules

- In Data Entry and Work List, if a selected query has predefined column widths for one or more of its columns then these column widths are used.
- If a query does not have any column widths predefined then any column widths predefined for the associated query view will be used instead.
- Any column whose predefined width is set to **(default)** will be sized according to its contents.

If no column widths have been predefined

If no widths have been predefined for any of the columns in the selected query or associated query view (ie all the column widths are set to **(default)**) then the initial widths for the columns will be taken from the previously stored settings. ("Previously stored settings" means the widths that were set manually in the grid the last time you viewed the query).

If no stored settings already exist (ie this is the first time the summary view and/or query view have been selected) then all columns in the grid use their **(default)** widths.

Re-sizing widths in Data Entry and Work List modules

If a query or query view has predefined widths, it is still possible to resize the columns manually in the grid.

Refreshing the grid

When the summary grid is refreshed, either manually or automatically, then the column widths will be reset to their predefined values, including those columns whose widths are set to **(default)**.

3.3.3 Important Note

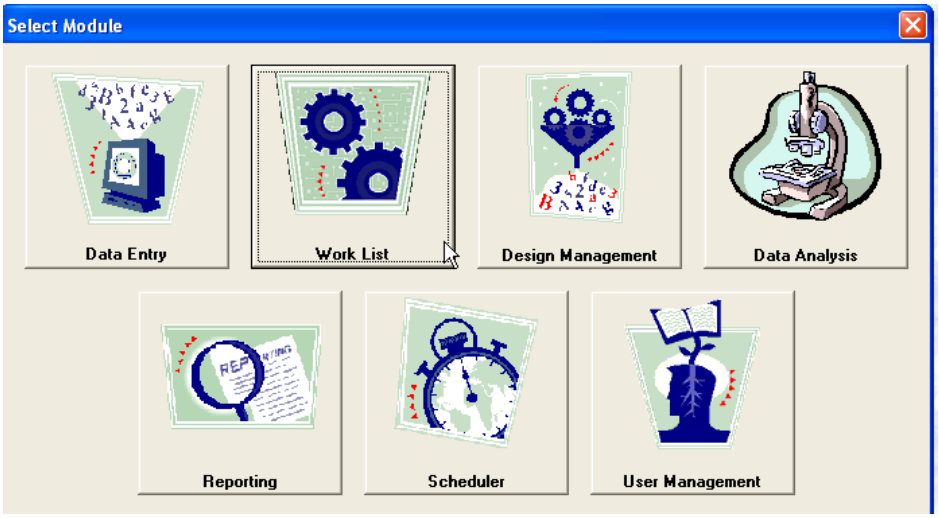
Note that care should be taken when editing query views used in summary views. Column widths may be cleared if changes are made to query views where predefined widths have been set, because the columns may no longer be the same in the edited query view.

4 USING THE WORK LIST MODULE

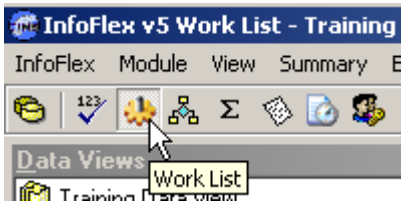
4.1 Starting the module

The Work List module can be displayed in one of three ways.

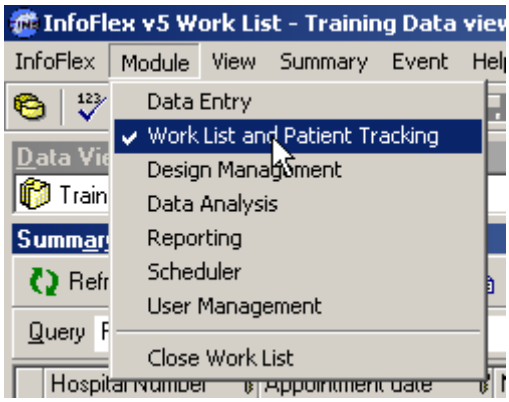
1) choose the module from the main screen when you first login to InfoFlex:



2) After logging in, click the **Work List** icon on the toolbar.



3) After logging in, go to the **Module** menu and choose **Work List and Patient Tracking**.



4.2 Displaying data

The Work List module has a simple layout with drop down lists controlling the data that is displayed. The layout allows the summary grid window to occupy the entire width of screen and maximises the number of data items that can be displayed.

The drop-down lists are as follows:

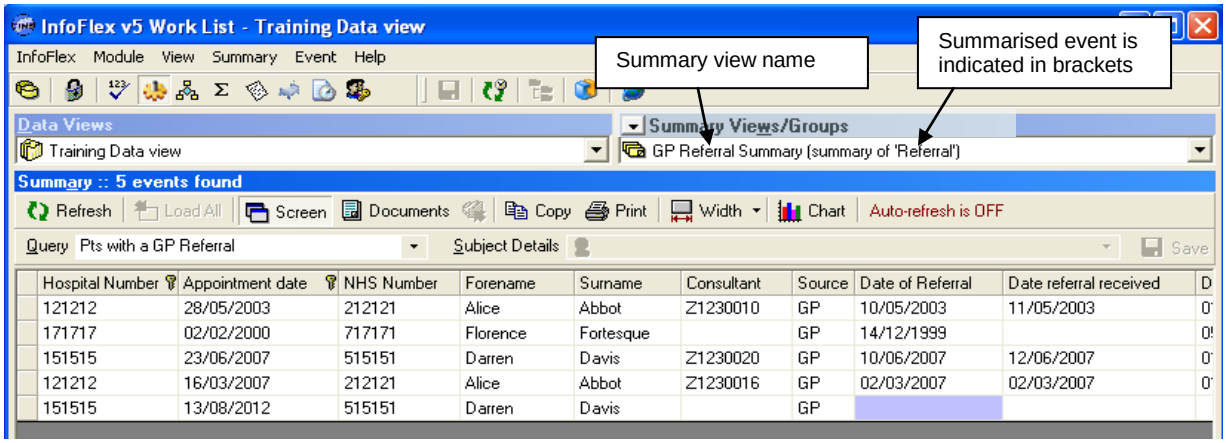
Data View Lists all the data views that the current user has access to. Selecting a different data view from this list will reset the contents of the **Summary Views** drop down list since summary views are attached to data views. If there is a valid summary view defined in a dictionary that the user has access to, the Data Views selection can be toggled to display dictionaries.

Summary Views/ Groups Lists the Summary Views and Groups that are available for the selected data view.

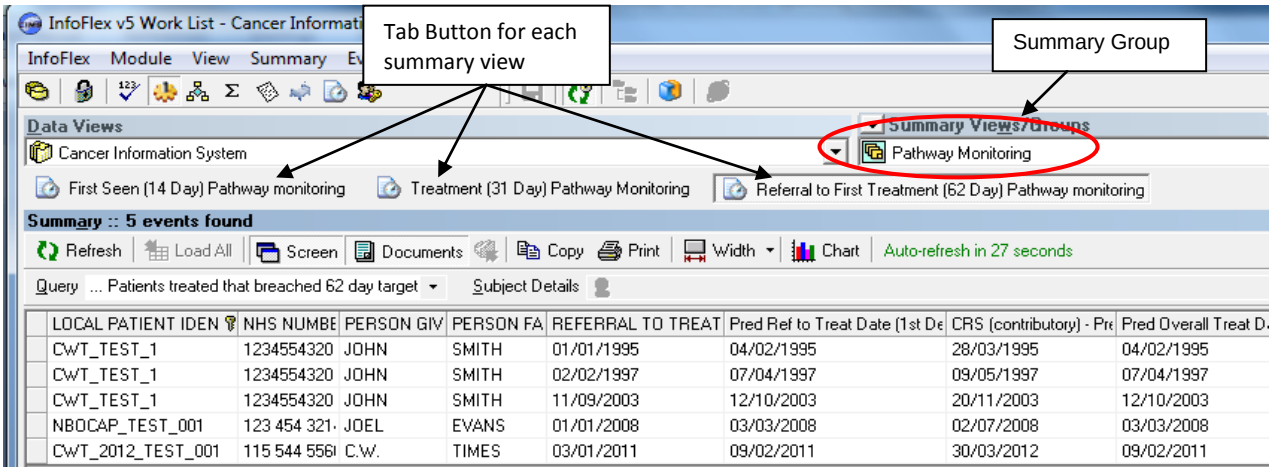
If a default summary view or group has been set for the data view, that summary view or group will be displayed automatically on selection of the data view.

Each summary view is linked to a **summarised event view** (indicated in brackets after the summary view name). A selection of data items from the summarised event view are displayed in the grid.

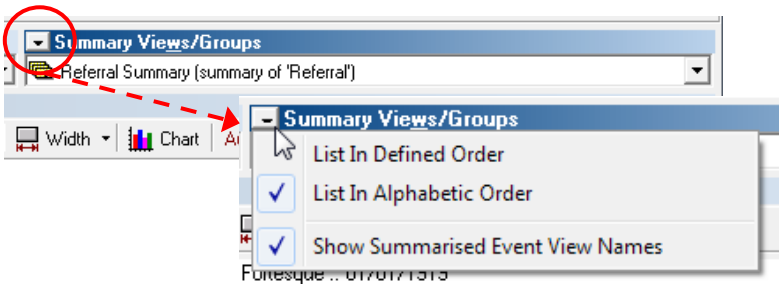
Selecting a different summary view will cause the query dropdown list and the summary grid to refresh, since queries are attached to summary views.



If you select a group rather than a view, the summary views within that group are displayed as tabs:



In the **Summary Views/Groups** list, the order in which the available summary views are listed is configurable. Press the dropdown arrow to display two options: **List in Defined Order** and **List in Alphabetic Order**.



The **Show Summarised Event View Names** option controls whether to display the name of the summarised event view alongside the name of the summary view in the Summary Views/Groups list. The default is to display the summarised event view name

Note about "Defined order"
Defined order for Summary Views is the order in which they appear in the tree in Design management. You can manually re-order the Summary Views in Design Management.
Defined order for Summary View Groups is currently the order in which they were created. This will be amended in a future release.

Query

Lists the queries that are available for the selected summary view.

Queries control which data items and which occurrences of the summarised event view are displayed.

If a default query has been set for the summary view, that query will be displayed automatically on selection of the summary view.

If no default query has been set, the **Query** shown will depend on the settings made in the Summary View definition. It will either display **(none)** or if the **(none)** option has been disabled, the Query selection box will display nothing at all and the grid will be empty until a query is selected. (See below 4.3.1).

4.2.1 Summary groups

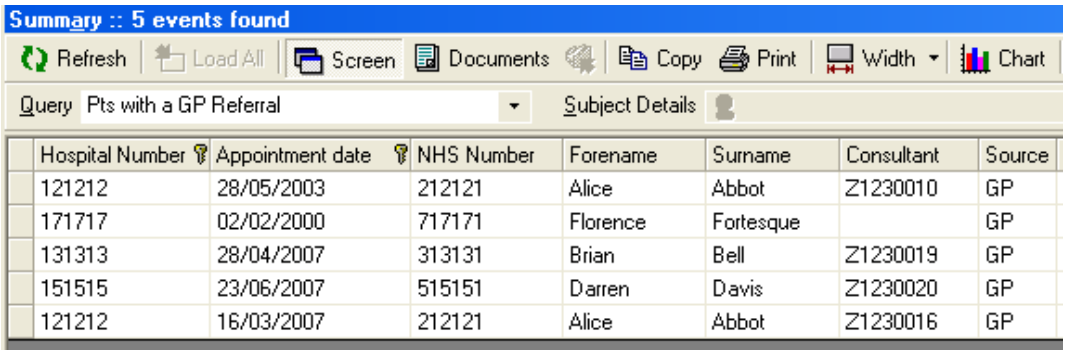
In the **Summary Views/Groups** selection box, if you choose a group rather than a summary view, a Summary View selector (row of tab buttons) is displayed below the **Data Views** and **Summary Views/Groups** selection boxes. There is a tab button for each summary view in the selected Summary Group. By default, the first Summary View in the group will be selected. Pressing a tab button will display the Summary View named on the button.

If the default queries for any of the summary views in the selected summary group contain prompt parameters then all of these will be prompted for when the summary view group is initially selected. The user will not be prompted again for the parameter values when changing summary view via the tab buttons, unless the selected query is changed manually. However, if the user refreshed the grid, the query parameters will be prompted for.

If the user changes the query selected in any of the Summary Views, then this selection is remembered if the user leaves the Summary View to go to one of the others in the group and comes back again.

4.3 How the grid works

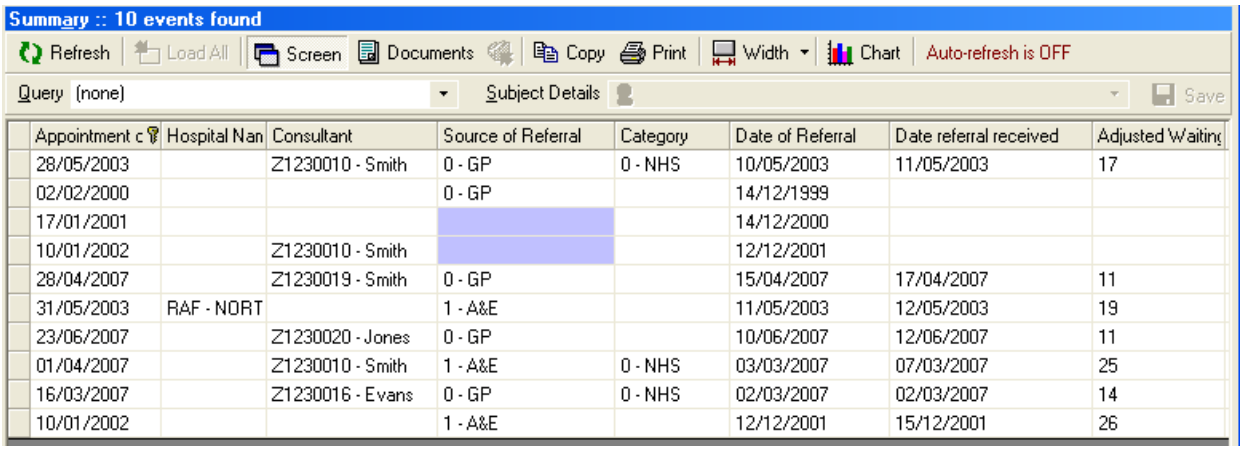
Data is displayed in the grid once a query has been selected. The query controls which data items are displayed and which occurrences of the summarised event view are displayed.



Hospital Number	Appointment date	NHS Number	Forename	Surname	Consultant	Source
121212	28/05/2003	212121	Alice	Abbot	Z1230010	GP
171717	02/02/2000	717171	Florence	Fortesque		GP
131313	28/04/2007	313131	Brian	Bell	Z1230019	GP
151515	23/06/2007	515151	Darren	Davis	Z1230020	GP
121212	16/03/2007	212121	Alice	Abbot	Z1230016	GP

4.3.1 (none) in the Query list

If you select **(none)** in the Query dropdown list, then the grid will display the whole summarised event view for all subjects. Note that in this case no subject information is displayed in the grid, although if you select a row, the **Subject Details** box will display the domain identifiers for that subject.

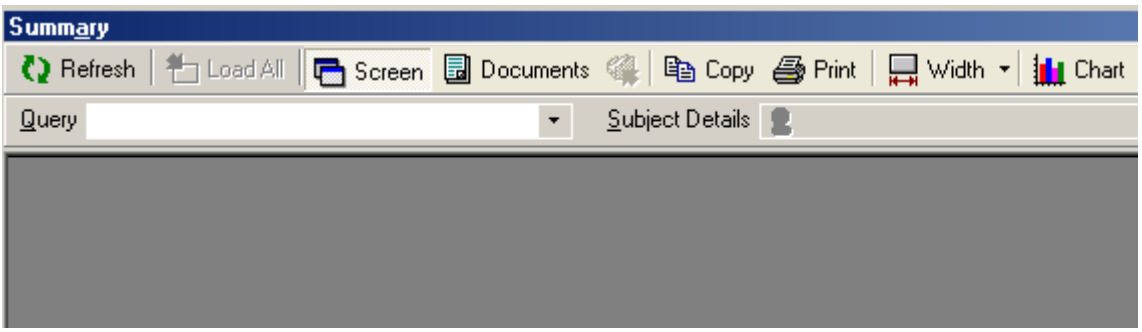


Appointment c	Hospital Nan	Consultant	Source of Referral	Category	Date of Referral	Date referral received	Adjusted Waiting
28/05/2003		Z1230010 - Smith	0 - GP	0 - NHS	10/05/2003	11/05/2003	17
02/02/2000			0 - GP		14/12/1999		
17/01/2001					14/12/2000		
10/01/2002		Z1230010 - Smith			12/12/2001		
28/04/2007		Z1230019 - Smith	0 - GP		15/04/2007	17/04/2007	11
31/05/2003	RAF - NORT		1 - A&E		11/05/2003	12/05/2003	19
23/06/2007		Z1230020 - Jones	0 - GP		10/06/2007	12/06/2007	11
01/04/2007		Z1230010 - Smith	1 - A&E	0 - NHS	03/03/2007	07/03/2007	25
16/03/2007		Z1230016 - Evans	0 - GP	0 - NHS	02/03/2007	02/03/2007	14
10/01/2002			1 - A&E		12/12/2001	15/12/2001	26

4.3.2 Default queries

If a default query has been set for a summary view, then default query is displayed as soon as a summary view is selected.

If no default query has been set, the grid will either display the **(none)** query described above, or the query dropdown list will be totally empty and no data at all will be displayed until a query is selected.



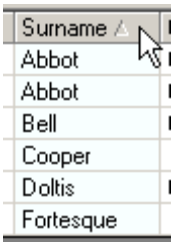
4.3.3 Prompt queries

Some of the available queries may be prompt queries. The **Enter parameter values** dialog is displayed as soon as you select the query. Enter the parameter and press **OK** to view the work list.

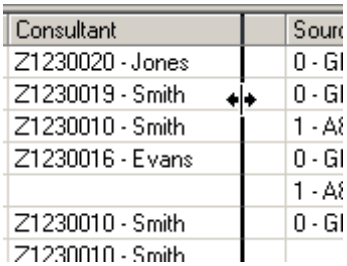
If you wish to change the parameter at any time, press **Refresh** and the **Enter parameter values** dialog will be displayed again.

4.3.4 Grid functions

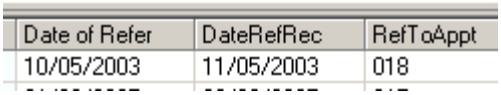
The data in the **Summary grid** can be sorted by clicking the appropriate column heading.



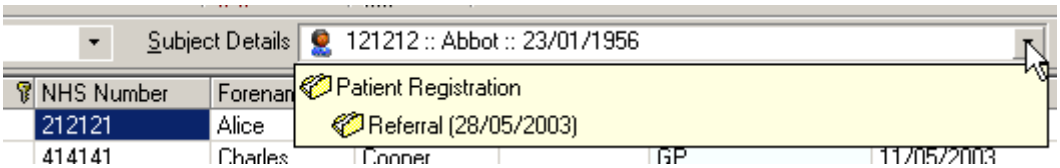
You can adjust the column widths by dragging and dropping or using the **Width** button.



You can choose to display abbreviated item names (go to the **View** menu and choose **Show abbreviated names**).



When you select a row in the grid the **Subject Details** box displays the domain identifiers for that subject. The **Subject Details** dropdown displays the event view hierarchy for the summarised event view.



4.4 Exercise - Selecting data views, summary views and queries

➢ Log into **CIMS Work List and Pathway Viewer training database** and go to the Work List module

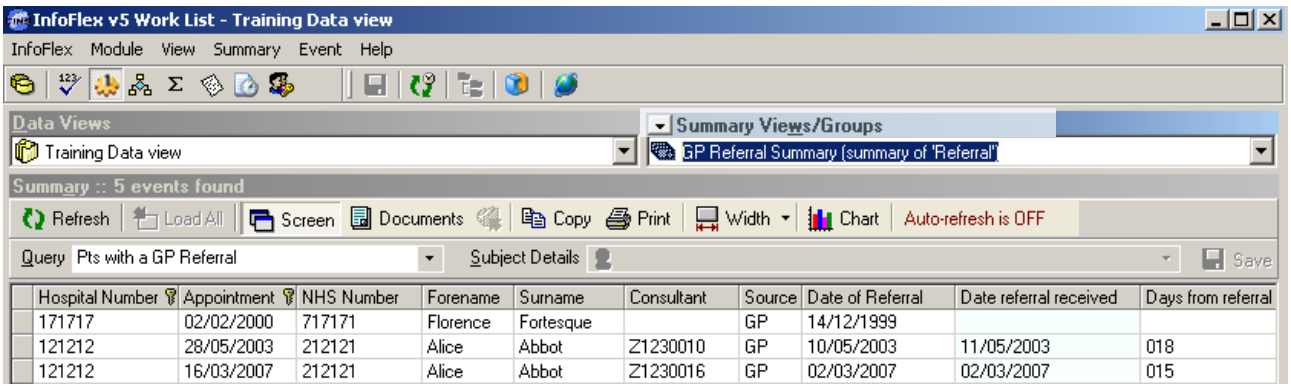
➢ Select the **Training** data view and select the **Referral Summary** in the **Summary Views** dropdown.

➢ Ensure the **Query** dropdown displays **Pts with a GP Referral** (this is the default query for the **Referral Summary** summary view).

➢ Review the data in the grid.

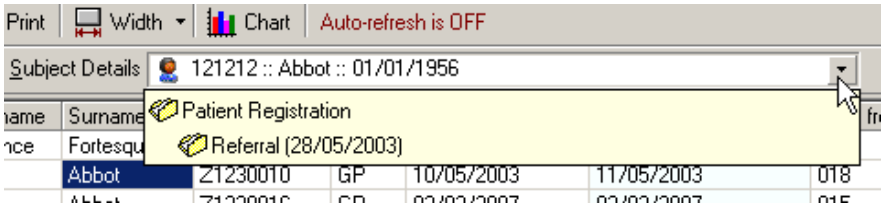
The data items displayed are taken from the **Referral** event view because this is the summarised event view.

All the event views displayed in the grid have a **Source of Referral** of **GP** because this is the criteria specified in the query.


InfoFlex v5 Work List - Training Data view
InfoFlex Module View Summary Event Help
Data Views
Training Data view
Summary Views/Groups
GP Referral Summary (summary of 'Referral')
Summary :: 5 events found
Refresh Load All Screen Documents Copy Print Width Chart Auto-refresh is OFF
Query Pts with a GP Referral
Subject Details
Save
Hospital Number Appointment NHS Number Forename Surname Consultant Source Date of Referral Date referral received Days from referral
171717 02/02/2000 717171 Florence Fortesque GP 14/12/1999
121212 28/05/2003 212121 Alice Abbot Z1230010 GP 10/05/2003 11/05/2003 018
121212 16/03/2007 212121 Alice Abbot Z1230016 GP 02/03/2007 02/03/2007 015

➢ Select a row in the grid and check that the **Subject Details** box displays the domain identifiers for the subject.

➢ Open the **Subject Details** dropdown list view the event view hierarchy for that event view.

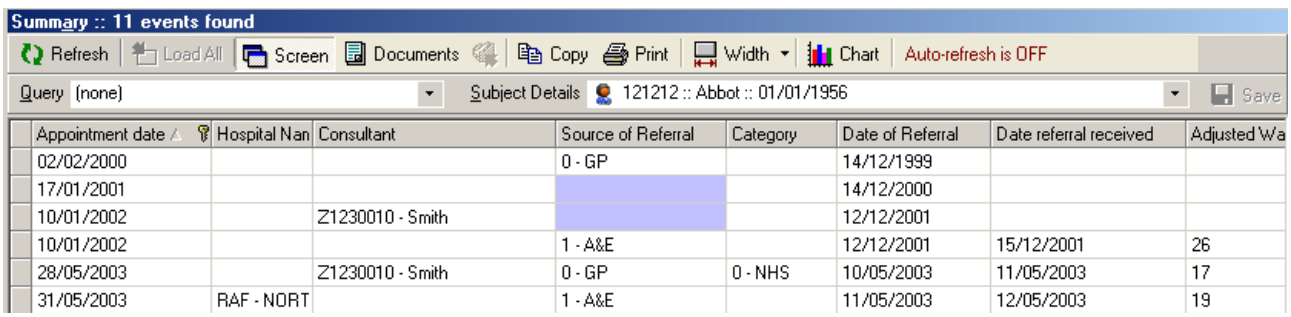


➢ Change the query to **(none)**.

➢ Review the data in the grid.

The grid now displays all data items in the **Referral** event view.

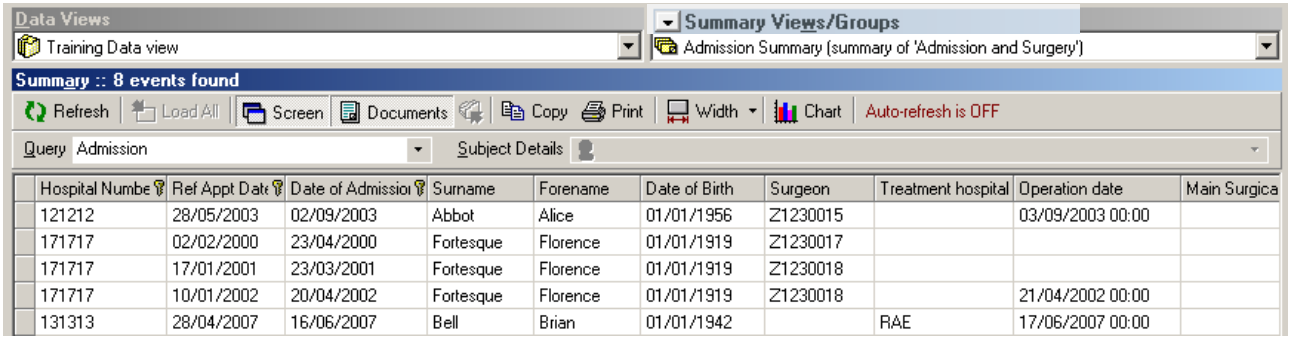
All occurrences of the Referral event view are now displayed (ie there is no longer a restriction to Source of Referral = GP).


Summary :: 11 events found
Refresh Load All Screen Documents Copy Print Width Chart Auto-refresh is OFF
Query (none)
Subject Details 121212 :: Abbot :: 01/01/1956
Save
Appointment date Hospital Nan Consultant Source of Referral Category Date of Referral Date referral received Adjusted Wa
02/02/2000 0 - GP 14/12/1999
17/01/2001 14/12/2000
10/01/2002 Z1230010 - Smith 12/12/2001
10/01/2002 1 - A&E 12/12/2001 15/12/2001 26
28/05/2003 Z1230010 - Smith 0 - GP 0 - NHS 10/05/2003 11/05/2003 17
31/05/2003 RAF - NORT 1 - A&E 11/05/2003 12/05/2003 19

➢ Select the **Admission Summary** summary view and ensure the **Query** dropdown displays **Admission** (this is the default query for the **Admissions** Summary view).

➢ Review the data in the grid.

The data items displayed are taken from the Admission & Surgery event view because this is the summarised event view.



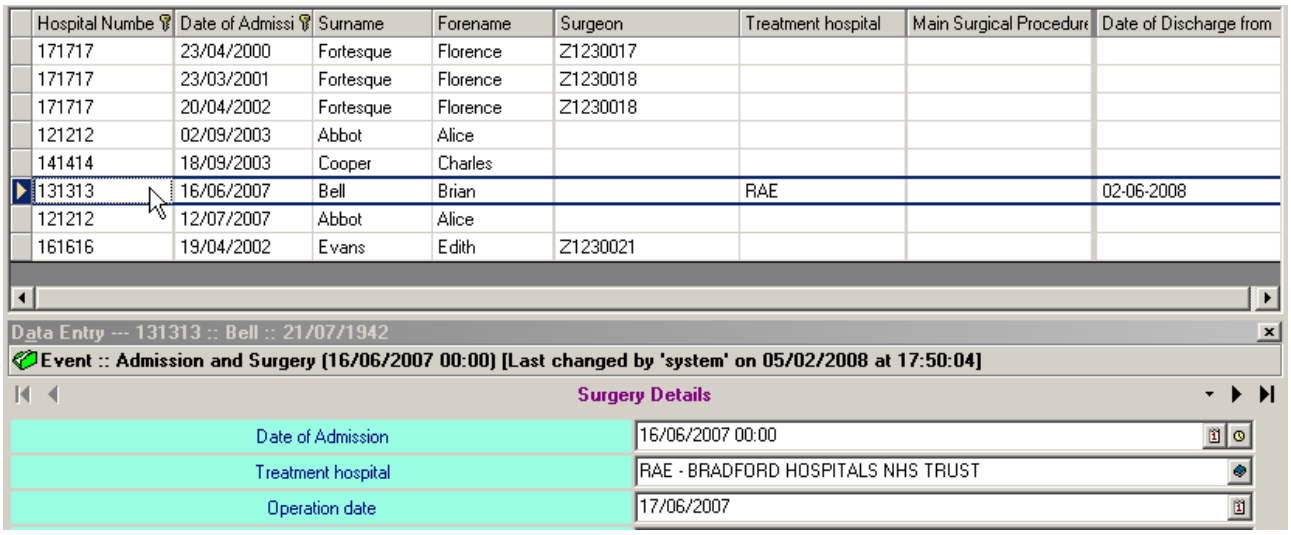
Hospital Numbe	Ref Appt Date	Date of Admissio	Surname	Forename	Date of Birth	Surgeon	Treatment hospital	Operation date	Main Surgica
121212	28/05/2003	02/09/2003	Abbot	Alice	01/01/1956	Z1230015		03/09/2003 00:00	
171717	02/02/2000	23/04/2000	Fortesque	Florence	01/01/1919	Z1230017			
171717	17/01/2001	23/03/2001	Fortesque	Florence	01/01/1919	Z1230018			
171717	10/01/2002	20/04/2002	Fortesque	Florence	01/01/1919	Z1230018		21/04/2002 00:00	
131313	28/04/2007	16/06/2007	Bell	Brian	01/01/1942		RAE	17/06/2007 00:00	

4.5 The data entry screen

If you select a row in the grid, the data entry screen displays the whole summarised event view for that row as it would be displayed in data entry.

The data entry screen will either be read only or allow editing, depending on the summary view definition and your own user permissions.

The summary view definition can also be set to prevent the data entry screen displaying at all, so summary views may not display the data entry screen on selection of a row.



Hospital Numbe	Date of Admissi	Surname	Forename	Surgeon	Treatment hospital	Main Surgical Procedure	Date of Discharge from
171717	23/04/2000	Fortesque	Florence	Z1230017			
171717	23/03/2001	Fortesque	Florence	Z1230018			
171717	20/04/2002	Fortesque	Florence	Z1230018			
121212	02/09/2003	Abbot	Alice				
141414	18/09/2003	Cooper	Charles				
131313	16/06/2007	Bell	Brian		RAE		02-06-2008
121212	12/07/2007	Abbot	Alice				
161616	19/04/2002	Evans	Edith	Z1230021			

Data Entry --- 131313 :: Bell :: 21/07/1942
Event :: Admission and Surgery (16/06/2007 00:00) [Last changed by 'system' on 05/02/2008 at 17:50:04]
Surgery Details
Date of Admission
16/06/2007 00:00
Treatment hospital
RAE - BRADFORD HOSPITALS NHS TRUST
Operation date
17/06/2007

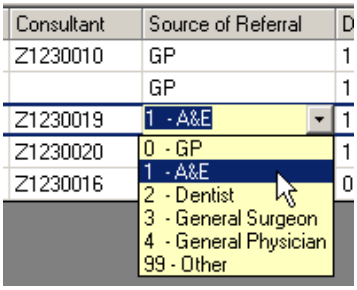
4.6 Editing data

If permission to edit data has been given, then data items belonging to the summarised event view can be edited either in the grid or in the data entry screen.

Note that it is only possible to edit data items that belong to the summarised event view. Other data items (eg demographic items) cannot be edited.

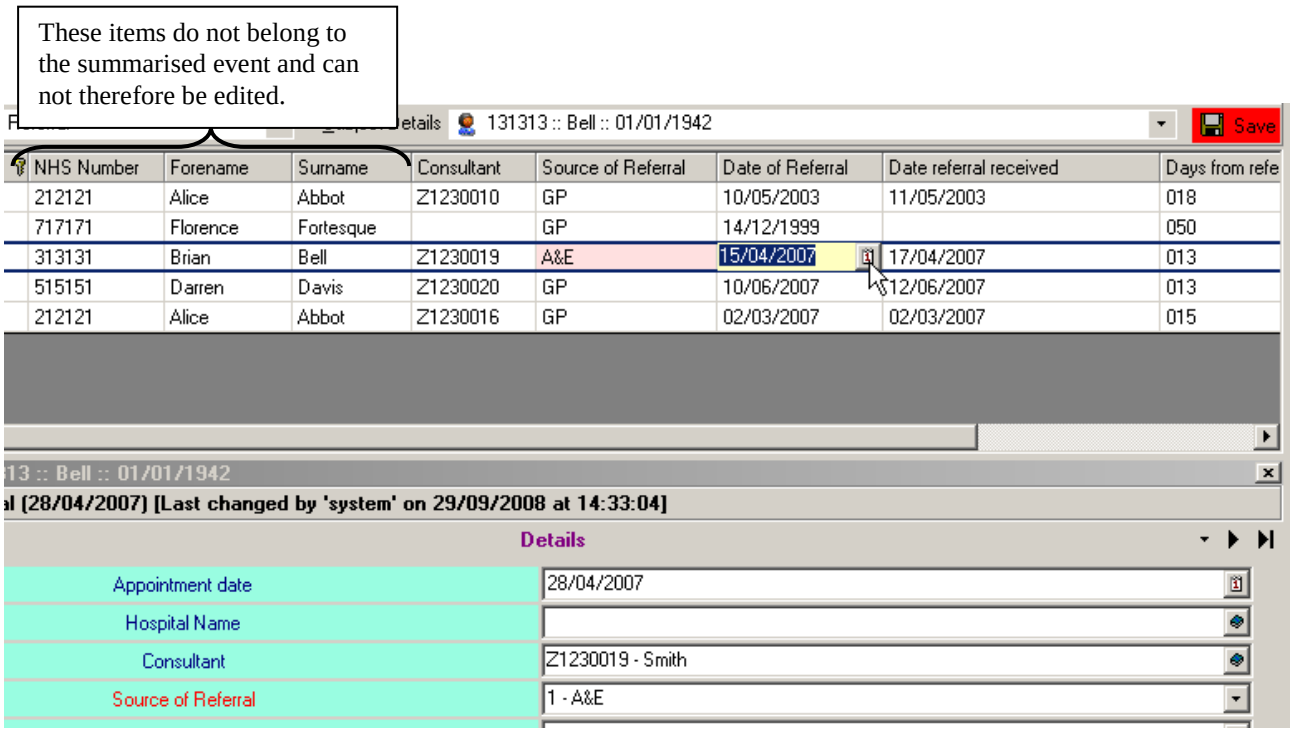
4.6.1 Editing data in the grid

To edit data in the grid, simply click in a cell.
If you have permission to edit, the cell will display the usual data entry controls.



As you move between cells, any cell you have edited turns pink in the grid and the item name is shown in red in the data entry screen. The **Save** button is enabled to indicate that changes have been made.

If you move to edit a cell in a different row without having saved, you will be prompted to save because you are moving to a different event. However if you move from one cell to another in the same row, you will not be prompted to save because all the items are in the same event.

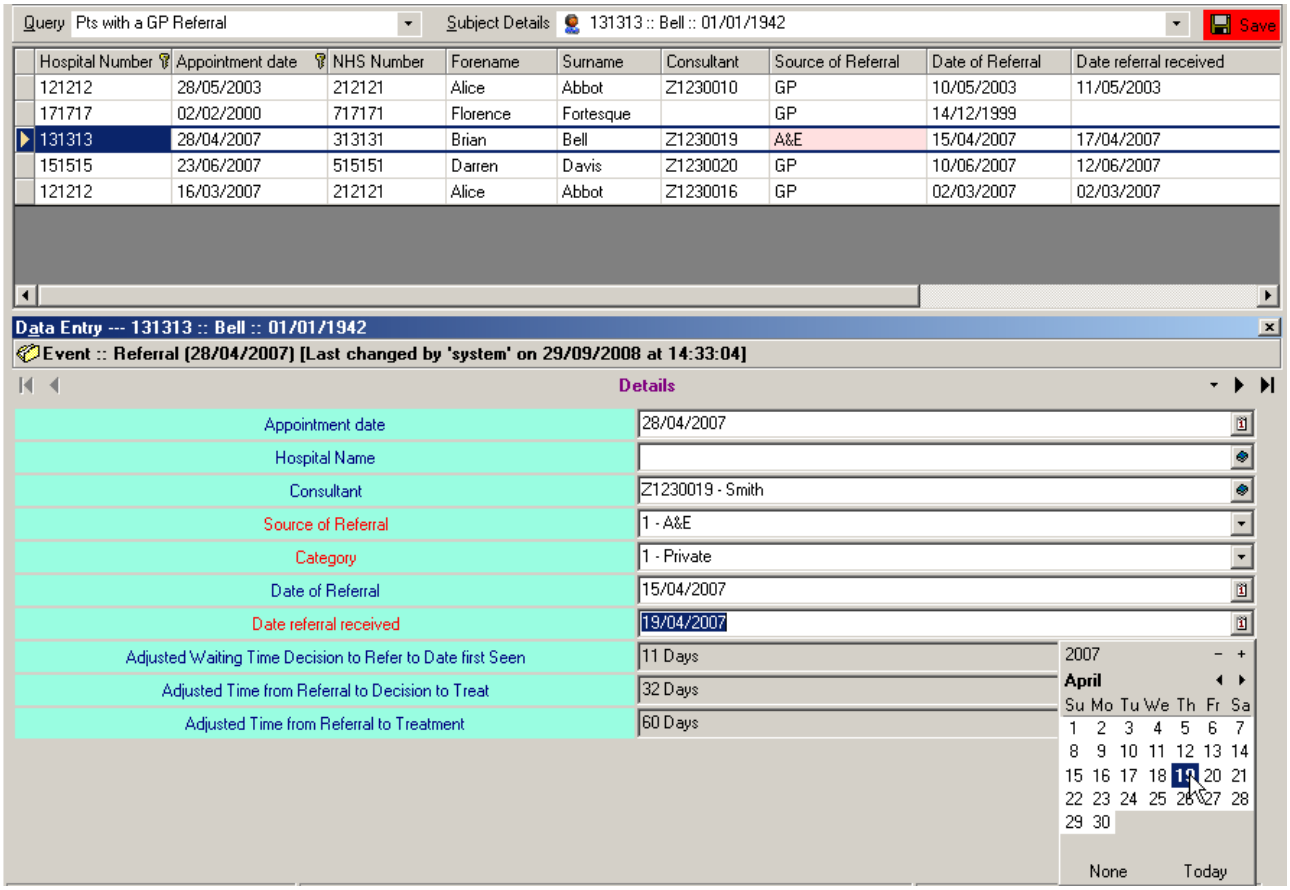

These items do not belong to the summarised event and can not therefore be edited.
131313 :: Bell :: 01/01/1942
Save
NHS Number
Forename
Surname
Consultant
Source of Referral
Date of Referral
Date referral received
Days from refe
212121 Alice Abbot Z1230010 GP 10/05/2003 11/05/2003 018
717171 Florence Fortesque GP 14/12/1999 050
313131 Brian Bell Z1230019 A&E 15/04/2007 17/04/2007 013
515151 Darren Davis Z1230020 GP 10/06/2007 12/06/2007 013
212121 Alice Abbot Z1230016 GP 02/03/2007 02/03/2007 015
13 :: Bell :: 01/01/1942
l (28/04/2007) [Last changed by 'system' on 29/09/2008 at 14:33:04]
Details
Appointment date
28/04/2007
Hospital Name
Consultant
Z1230019 - Smith
Source of Referral
1 - A&E

When you have finished editing, press the **Save** button, and the data entry screen will be updated with the edited data.

4.6.2 Editing data in the data entry screen

To edit data in the data entry screen, first highlight a row in the grid. This causes the data entry screen to display the whole summarised event view for the selected row.

Edit data in the same way as you would in the Data Entry module. Navigate through the panels as appropriate and press the **Save** button when you have finished editing.


Query Pts with a GP Referral
Subject Details 131313 :: Bell :: 01/01/1942
Save
Hospital Number | Appointment date | NHS Number | Forename | Surname | Consultant | Source of Referral | Date of Referral | Date referral received
121212 | 28/05/2003 | 212121 | Alice | Abbot | Z1230010 | GP | 10/05/2003 | 11/05/2003
171717 | 02/02/2000 | 717171 | Florence | Fortesque | | GP | 14/12/1999 |
131313 | 28/04/2007 | 313131 | Brian | Bell | Z1230019 | A&E | 15/04/2007 | 17/04/2007
151515 | 23/06/2007 | 515151 | Darren | Davis | Z1230020 | GP | 10/06/2007 | 12/06/2007
121212 | 16/03/2007 | 212121 | Alice | Abbot | Z1230016 | GP | 02/03/2007 | 02/03/2007
Data Entry --- 131313 :: Bell :: 01/01/1942
Event :: Referral (28/04/2007) [Last changed by 'system' on 29/09/2008 at 14:33:04]
Details
Appointment date 28/04/2007
Hospital Name
Consultant Z1230019 - Smith
Source of Referral 1 - A&E
Category 1 - Private
Date of Referral 15/04/2007
Date referral received 19/04/2007
Adjusted Waiting Time Decision to Refer to Date first Seen 11 Days
Adjusted Time from Referral to Decision to Treat 32 Days
Adjusted Time from Referral to Treatment 60 Days
2007
April
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30
None Today

4.7 Exercise – Editing data

4.7.1 Editing data in the grid

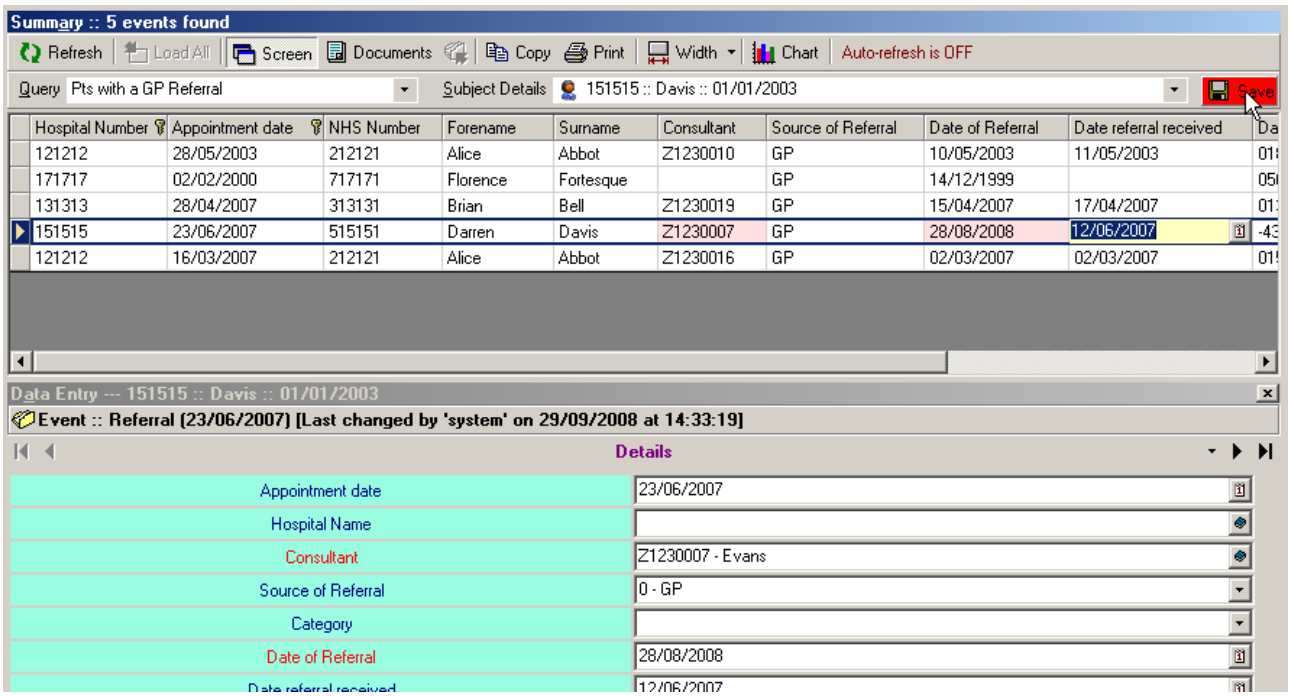
➢ Select the **Referral Summary** summary view and select patient **Darren Davis** in the grid.

➢ Click in various cells and note that you cannot edit any demographic data items, but that you can edit Referral data items.

➢ Change the **Consultant** and the **Date of Referral**.

The changed items are displayed with pink highlights in the grid and with red item names in the data entry screen. The updated data is displayed in the data entry screen as soon as you exit the cell in the grid. The **Save** button has been enabled.

➢ Save your changes.



4.7.2 Editing data in the data entry screen

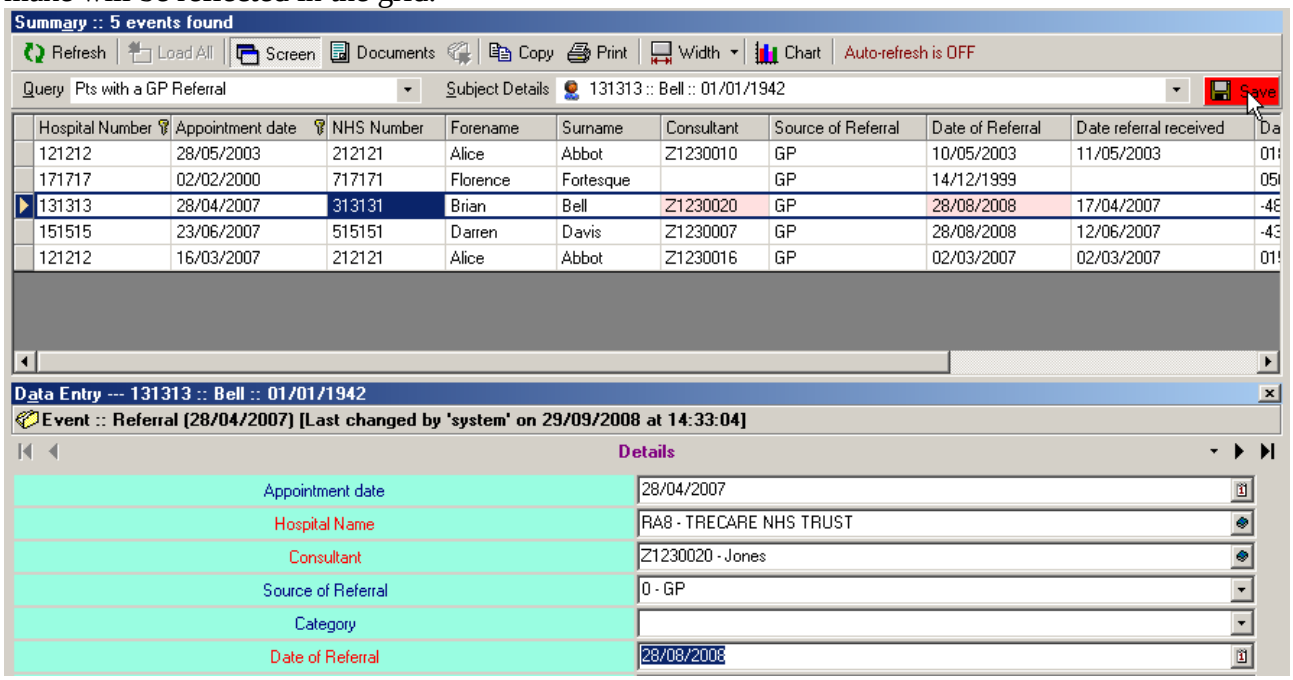
➢ Select the **Referral Summary** summary view and select patient **Brian Bell** in the grid.

➢ Make some changes to the data in the data entry screen.

The data entry screen behaves in the same way as the data entry module.

If you make changes to items that are displayed in the grid, those items are highlighted in the grid and the data is updated straight away.

Note that the data entry screen displays the entire summarised event view, so not all changes you make will be reflected in the grid.



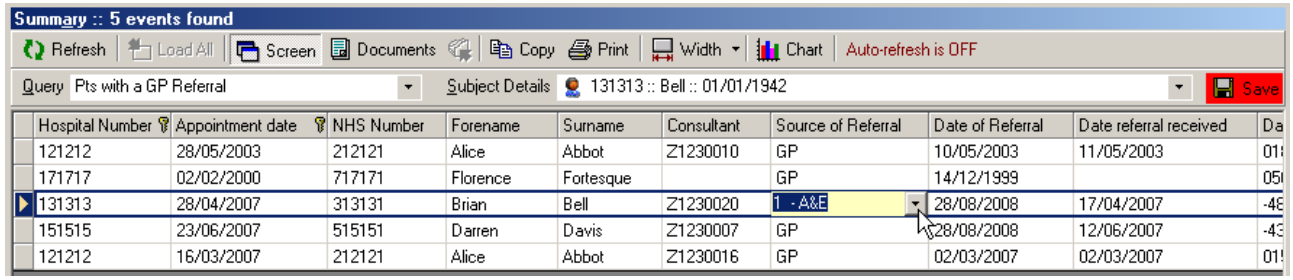
➢ Save your changes.

4.7.3 Editing filter criteria data

➢ Ensure the **Pts with a GP Referral** query is selected.

➢ Select patient **Brian Bell** and change the **Source of Referral** to **1 – A&E**.

➢ **Save** the changes.

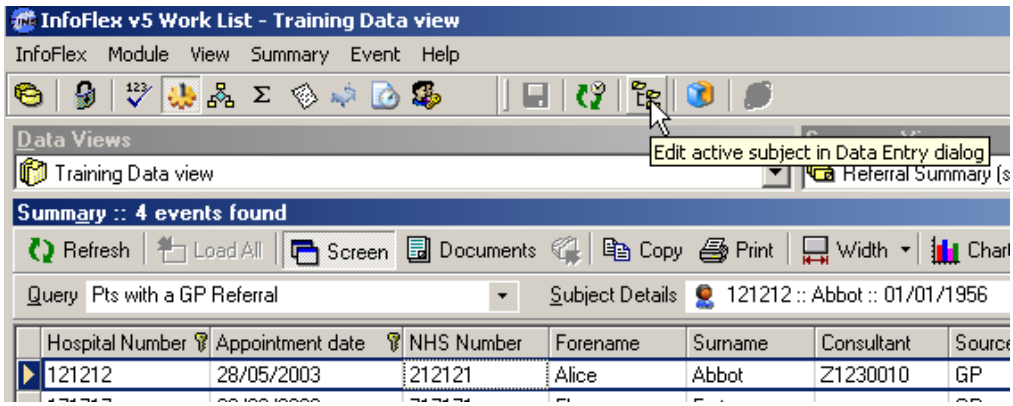


Note that the occurrence of that event view disappears from the grid because it no longer meets the filter criteria for the query.

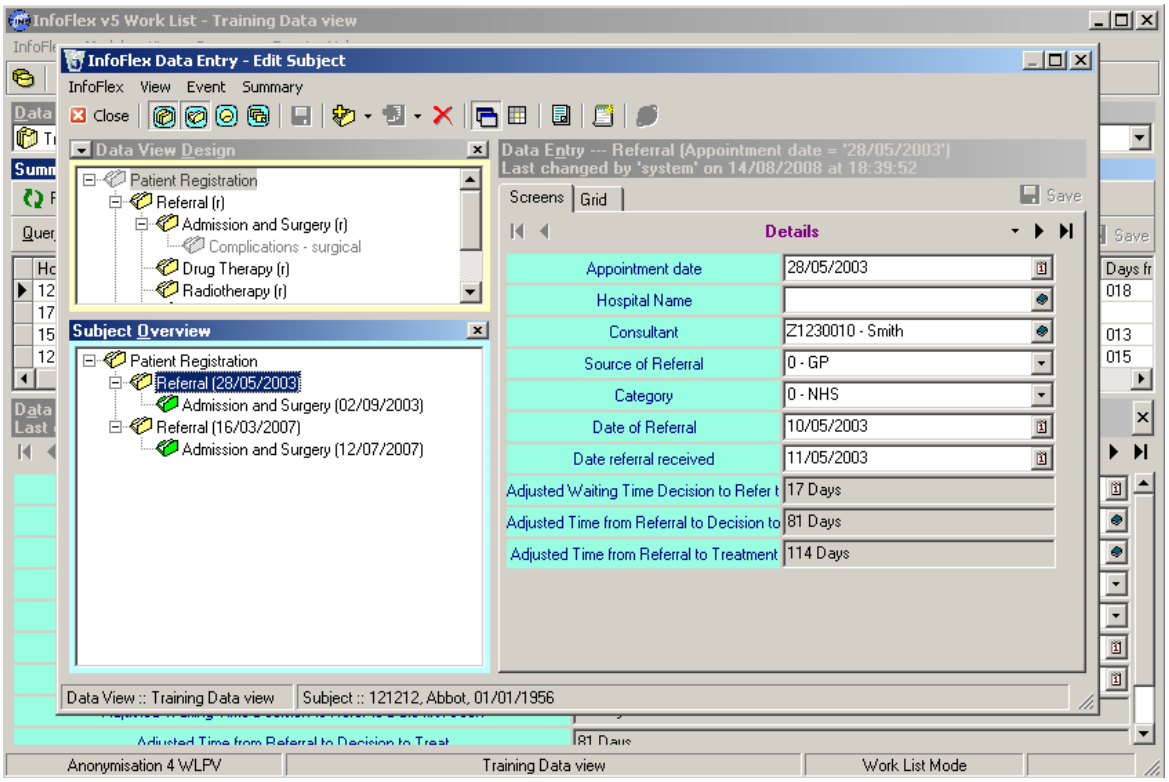
4.8 Editing a subject in Data Entry

It is possible to edit a subject in Data Entry from the Work List module.

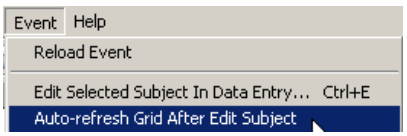
Highlight a row in the grid and then press **Edit active subject in Data Entry dialog** on the toolbar. (Note that you can also double click the row in the grid or use the **Ctrl E** shortcut to open the dialog).


InfoFlex v5 Work List - Training Data view
InfoFlex Module View Summary Event Help
Edit active subject in Data Entry dialog
Data Views
Training Data view
Summary :: 4 events found
Refresh Load All Screen Documents Copy Print Width
Query Pts with a GP Referral
Subject Details 121212 :: Abbot :: 01/01/1956
Hospital Number Appointment date NHS Number Forename Surname Consultant Source
121212 28/05/2003 212121 Alice Abbot Z1230010 GP

A new Data Entry window displays full data entry functions for the selected subject only. By default the summarised event view is displayed for editing, but any event view can be edited, and new event views can be added.


InfoFlex v5 Work List - Training Data view
InfoFlex Data Entry - Edit Subject
InfoFlex View Event Summary
Close
Data View Design
Patient Registration
Referral (r)
Admission and Surgery (r)
Complications - surgical
Drug Therapy (r)
Radiotherapy (r)
Subject Overview
Patient Registration
Referral (28/05/2003)
Admission and Surgery (02/09/2003)
Referral (16/03/2007)
Admission and Surgery (12/07/2007)
Data Entry --- Referral (Appointment date = '28/05/2003')
Last changed by 'system' on 14/08/2008 at 18:39:52
Screens Grid
Save
Details
Appointment date 28/05/2003
Hospital Name
Consultant Z1230010 - Smith
Source of Referral 0 - GP
Category 0 - NHS
Date of Referral 10/05/2003
Date referral received 11/05/2003
Adjusted Waiting Time Decision to Refer t 17 Days
Adjusted Time from Referral to Decision to 81 Days
Adjusted Time from Referral to Treatment 114 Days
Data View :: Training Data view
Subject :: 121212, Abbot, 01/01/1956
Anonymisation 4 WLPV
Training Data view
Work List Mode

Once you have finished editing, close the Data Entry window. You can choose whether you would like the grid to refresh after saving your changes. By default, the grid does **not** refresh. If you would like the grid to refresh when you close the Data Entry window, go to the **Event** menu in the Work List module (before you edit a subject in Data Entry) and switch on **Auto-refresh Grid After Edit Subject**.



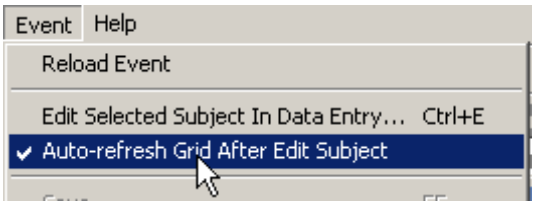
4.9 Exercise - Editing a subject in Data Entry

If you wish to view and edit a particular subject in more detail, you can choose to view that subject in Data Entry. You can make changes to data in any event for that subject and add new events.

You can choose whether the grid refreshes after you have finished editing the subject. If there are many patients in the grid, or if you are editing data from events not displayed in the grid, it can save time if you do not refresh after saving. On the **Event** menu, the **Auto-refresh Grid After Edit Subject** option controls whether the grid refreshes after editing a subject. By default this setting is switched **off** meaning that the grid will not automatically refresh after editing and any changes you make will not be reflected in the grid.

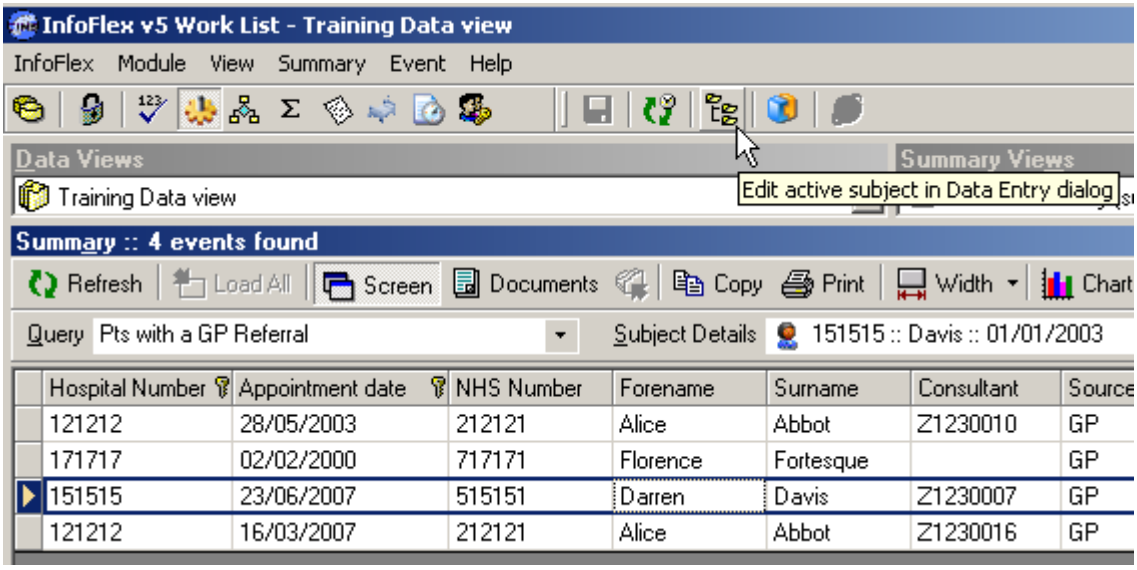
For the purposes of this exercise, we shall switch on the **Auto-refresh Grid After Edit Subject** function.

➢ Go to the Event menu and switch on **Auto-refresh Grid After Edit Subject**.



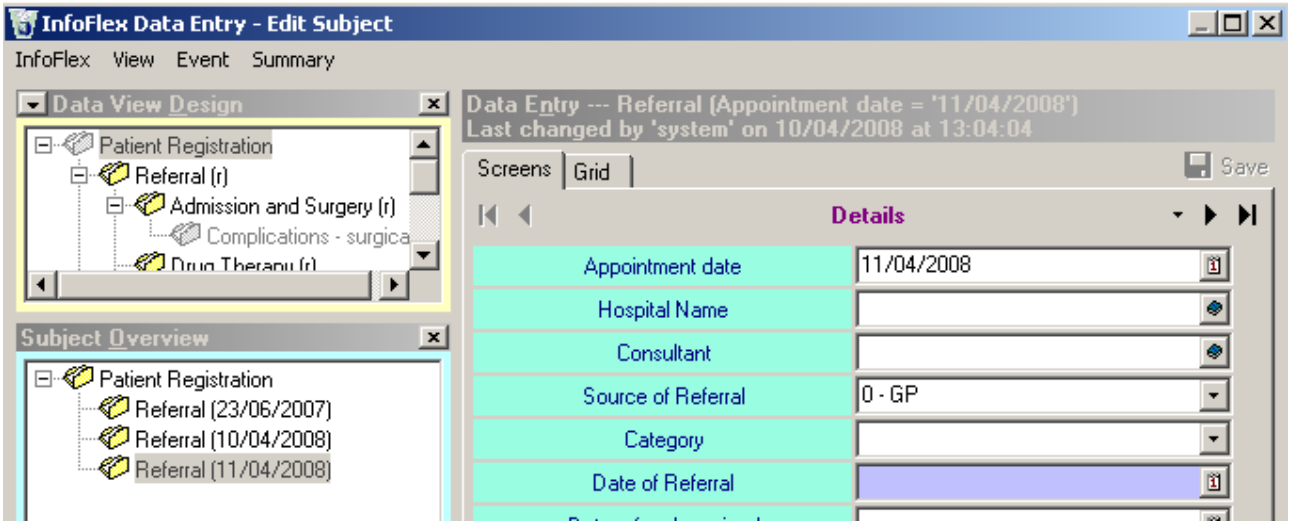
➢ Select the **Pts with a GP Referral** query.

➢ Highlight patient **Darren Davis** in the grid then press the **Edit active subject in Data Entry dialog** button on the toolbar. (If you wish, you can double click the row in the grid, or use **Ctrl E** instead of using the toolbar button).


InfoFlex v5 Work List - Training Data view
InfoFlex Module View Summary Event Help
Data Views
Summary Views
Training Data view
Edit active subject in Data Entry dialog
Summary :: 4 events found
Refresh Load All Screen Documents Copy Print Width Chart
Query Pts with a GP Referral
Subject Details 151515 :: Davis :: 01/01/2003
Hospital Number Appointment date NHS Number Forename Surname Consultant Source
121212 28/05/2003 212121 Alice Abbot Z1230010 GP
171717 02/02/2000 717171 Florence Fortesque GP
151515 23/06/2007 515151 Darren Davis Z1230007 GP
121212 16/03/2007 212121 Alice Abbot Z1230016 GP

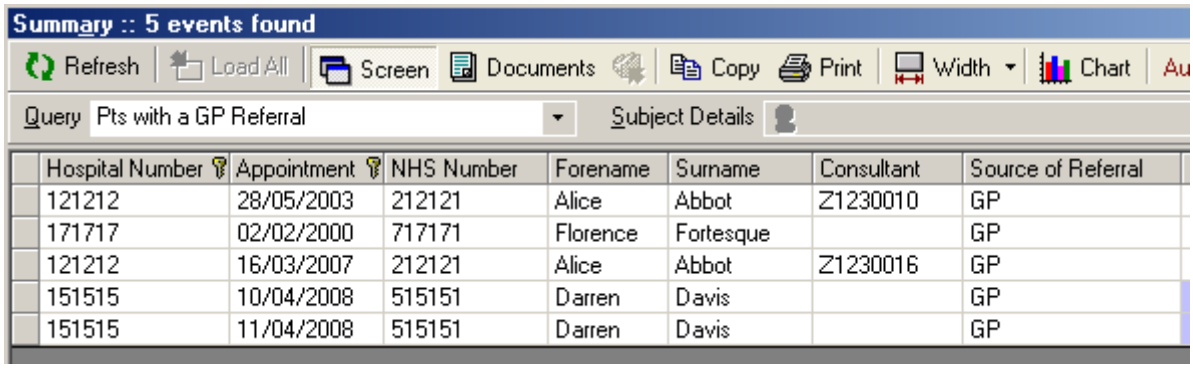
➢ In the Data Entry window, change the **Source of Referral** to **1 – A&E** and **Save** the change.

➢ Then add two further **Referral** event views, each with a **Source of Referral** of **0 – GP**.



➢ Close the Data Entry window.

➢ Ensure that the grid now displays the two most recent Referral event views you have added for Darren Davis.



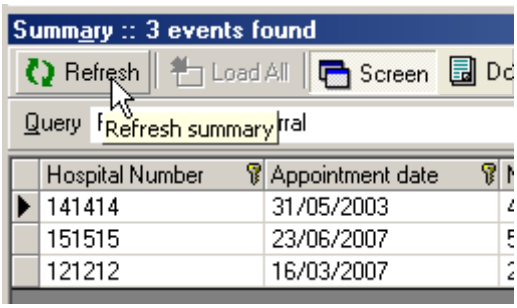
Hospital Number	Appointment	NHS Number	Forename	Surname	Consultant	Source of Referral
121212	28/05/2003	212121	Alice	Abbot	Z1230010	GP
171717	02/02/2000	717171	Florence	Fortesque		GP
121212	16/03/2007	212121	Alice	Abbot	Z1230016	GP
151515	10/04/2008	515151	Darren	Davis		GP
151515	11/04/2008	515151	Darren	Davis		GP

4.10 Refresh and Auto-refresh (Polling)

4.10.1 Manual refresh

If more than one person is using the database, you may wish to periodically refresh the data you are working on to ensure that it is up to date.

To carry out a manual refresh, simply press the **Refresh** button.



On pressing **Refresh**, the data in the grid for the currently selected query will be updated with any changes that have been made by other users.

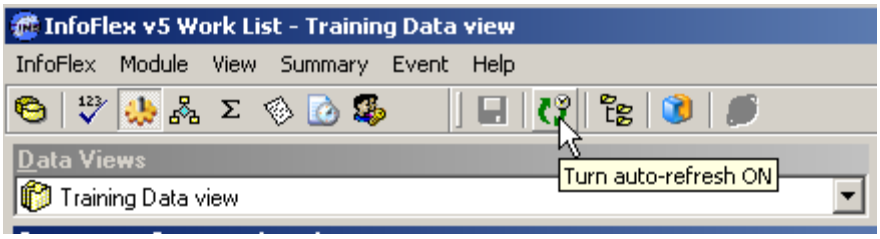
Any new occurrences of the summarised event view which meet the query criteria will be added to the grid.

Any occurrences of the summarised event view which no longer meet the query criteria will be removed.

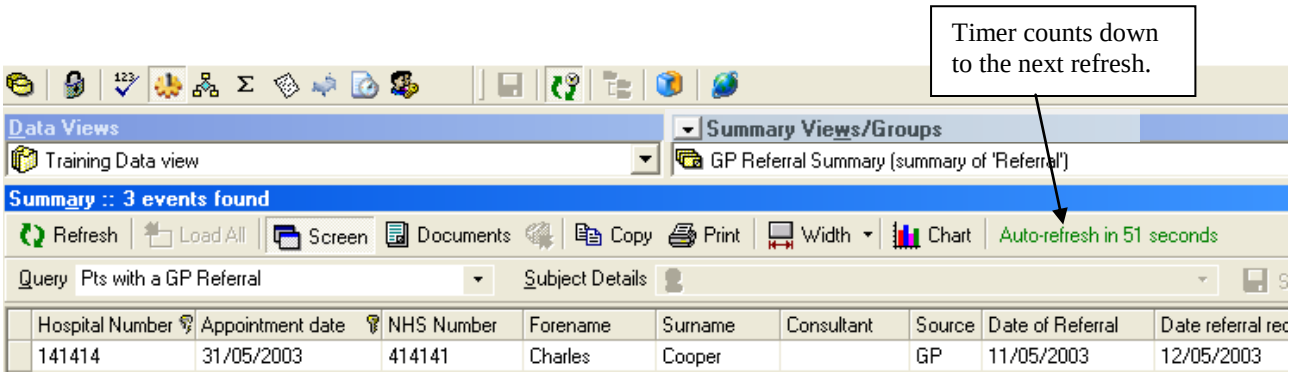
4.10.2 Auto-refresh (Polling)

If you wish to update your data regularly whilst you are using the Work List module, then you can switch on the **Auto-Refresh** function. This function refreshes the grid every 60 seconds.

To switch on the Auto-Refresh function, press the **Auto-Refresh** button.


InfoFlex v5 Work List - Training Data view
InfoFlex Module View Summary Event Help
Data Views
Training Data view
Turn auto-refresh ON

Whilst the function is switched on, a count down is displayed on the toolbar, indicating how many seconds will elapse before the refresh is carried out.



The timer will re-set itself to one minute in the following circumstances:

- if you change the query
- if you change the summary view
- if you carry out a manual refresh
- if you save changes

The timer will be suspended in the following circumstances:

- if you edit some data in the grid or the data entry screen
- if you edit a subject in data entry
- if you switch modules

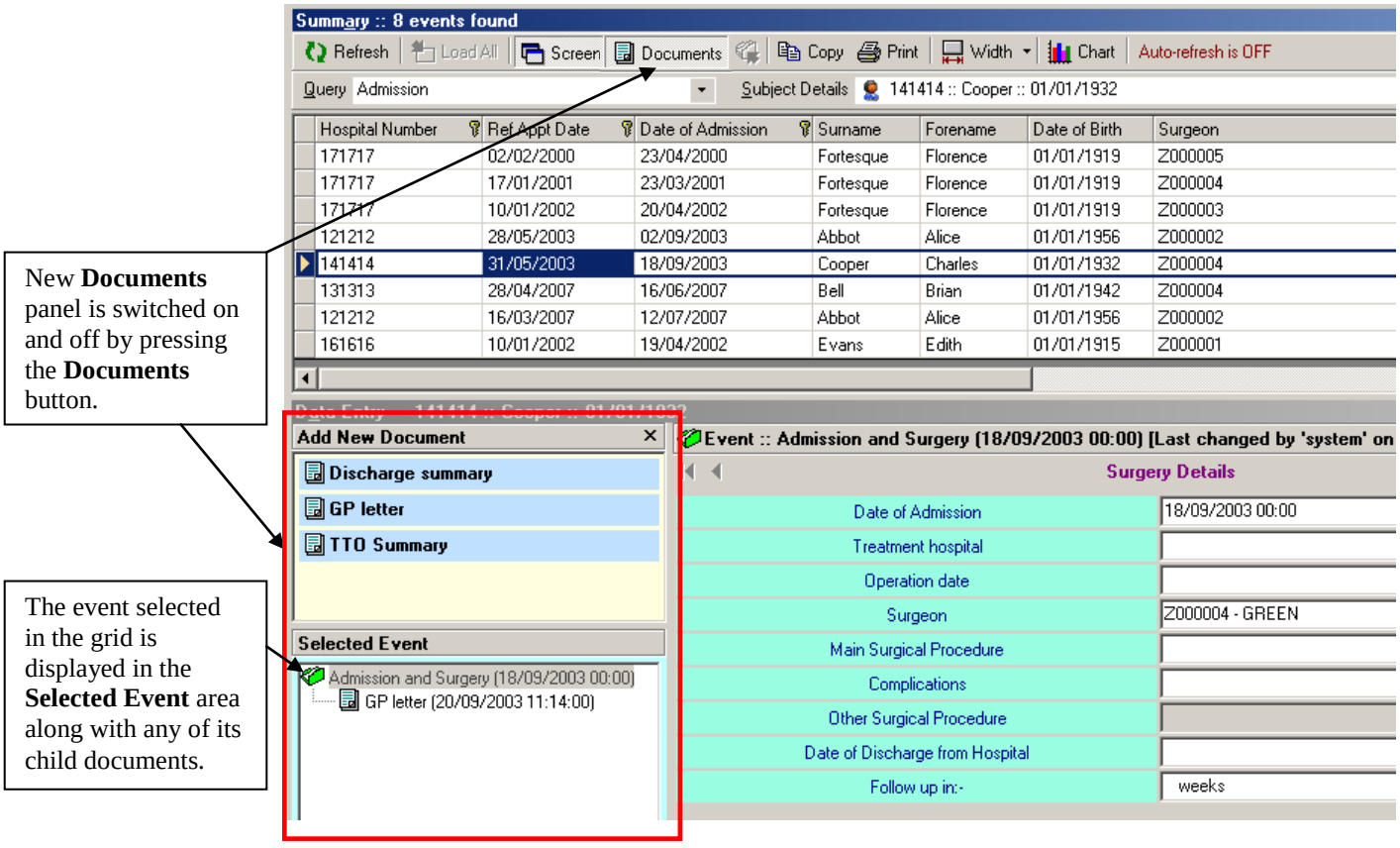
If two users are editing the same occurrence of an event view, then the changes that are saved last will be retained.

4.11 Viewing and generating documents in the Work List module

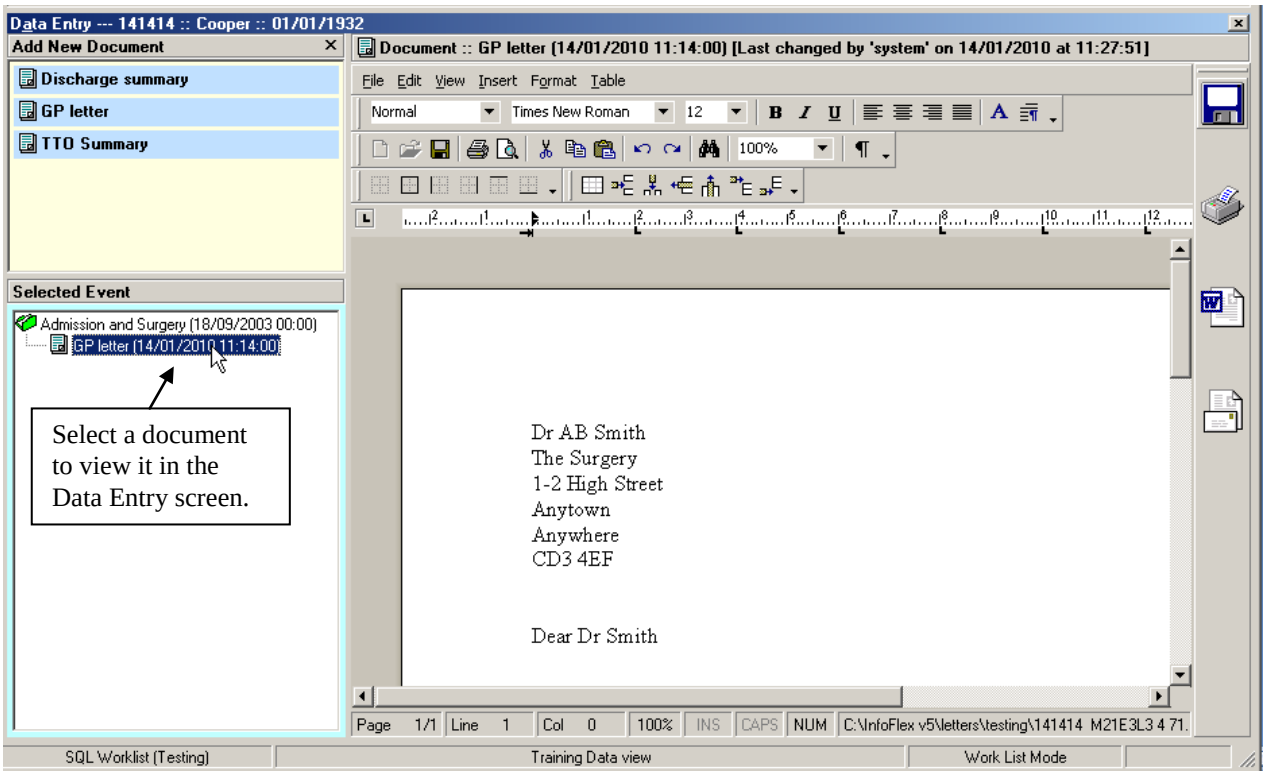
It is possible to view, edit and create documents in the Work List module. Child documents of the selected summary grid event can be viewed, edited and created. Documents can also be auto-generated from the Work List module.

The data entry screen below the summary grid can optionally display a **Documents** panel which shows the selected summary grid event along with any child documents that are attached to it. The **Documents** panel is switched on by pressing the **Documents** button on the Work List toolbar.

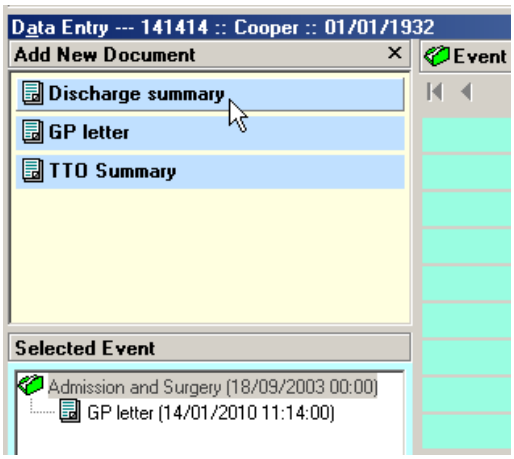
When an event is selected in the grid, the event is displayed in the data entry screen as normal and also in the **Selected Event** section of the **Documents** panel.

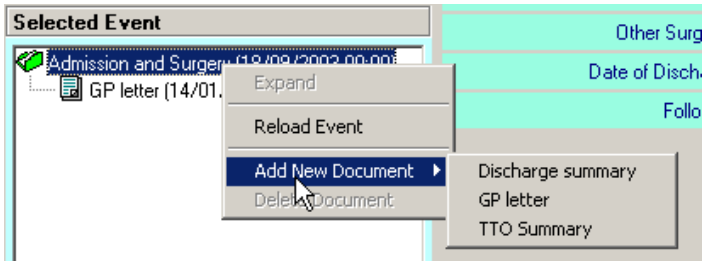

New **Documents** panel is switched on and off by pressing the **Documents** button.
The event selected in the grid is displayed in the **Selected Event** area along with any of its child documents.
Summary :: 8 events found
Refresh
Load All
Screen
Documents
Copy
Print
Width
Chart
Auto-refresh is OFF
Query Admission
Subject Details
141414 :: Cooper :: 01/01/1932
Hospital Number
Ref Appt Date
Date of Admission
Surname
Forename
Date of Birth
Surgeon
171717 02/02/2000 23/04/2000 Fortesque Florence 01/01/1919 Z000005
171717 17/01/2001 23/03/2001 Fortesque Florence 01/01/1919 Z000004
171717 10/01/2002 20/04/2002 Fortesque Florence 01/01/1919 Z000003
121212 28/05/2003 02/09/2003 Abbot Alice 01/01/1956 Z000002
141414 31/05/2003 18/09/2003 Cooper Charles 01/01/1932 Z000004
131313 28/04/2007 16/06/2007 Bell Brian 01/01/1942 Z000004
121212 16/03/2007 12/07/2007 Abbot Alice 01/01/1956 Z000002
161616 10/01/2002 19/04/2002 Evans Edith 01/01/1915 Z000001
Add New Document
Discharge summary
GP letter
TTO Summary
Selected Event
Admission and Surgery (18/09/2003 00:00)
GP letter (20/09/2003 11:14:00)
Event :: Admission and Surgery (18/09/2003 00:00) [Last changed by 'system' on
Surgery Details
Date of Admission 18/09/2003 00:00
Treatment hospital
Operation date
Surgeon Z000004 - GREEN
Main Surgical Procedure
Complications
Other Surgical Procedure
Date of Discharge from Hospital
Follow up in:- weeks

To view an existing document, select the document in the **Selected Event** area. As in the Data Entry module, the document is displayed in place of the data entry screen. The document can be edited, saved and deleted as normal.

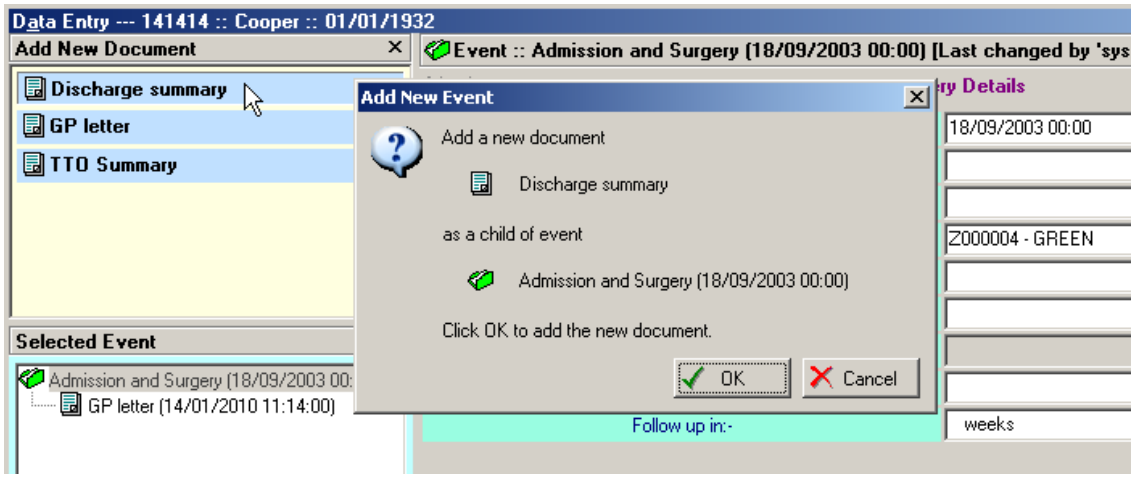

Data Entry --- 141414 :: Cooper :: 01/01/1932
Add New Document
Discharge summary
GP letter
TTO Summary
Selected Event
Admission and Surgery (18/09/2003 00:00)
GP letter (14/01/2010 11:14:00)
Select a document to view it in the Data Entry screen.
Document :: GP letter (14/01/2010 11:14:00) [Last changed by 'system' on 14/01/2010 at 11:27:51]
File Edit View Insert Format Table
Dr AB Smith
The Surgery
1-2 High Street
Anytown
Anywhere
CD3 4EF
Dear Dr Smith
SQL Worklist (Testing)
Training Data view
Work List Mode

To add a new document, single click a button in the **Add New Document** button list. The button list contains all the documents that can be attached to the selected event. Note that if a non-repeat document has already been generated, that document is not displayed in the Add New Document list. Documents can also be added by using the right click menu in the **Selected Event** area or the main Event menu.

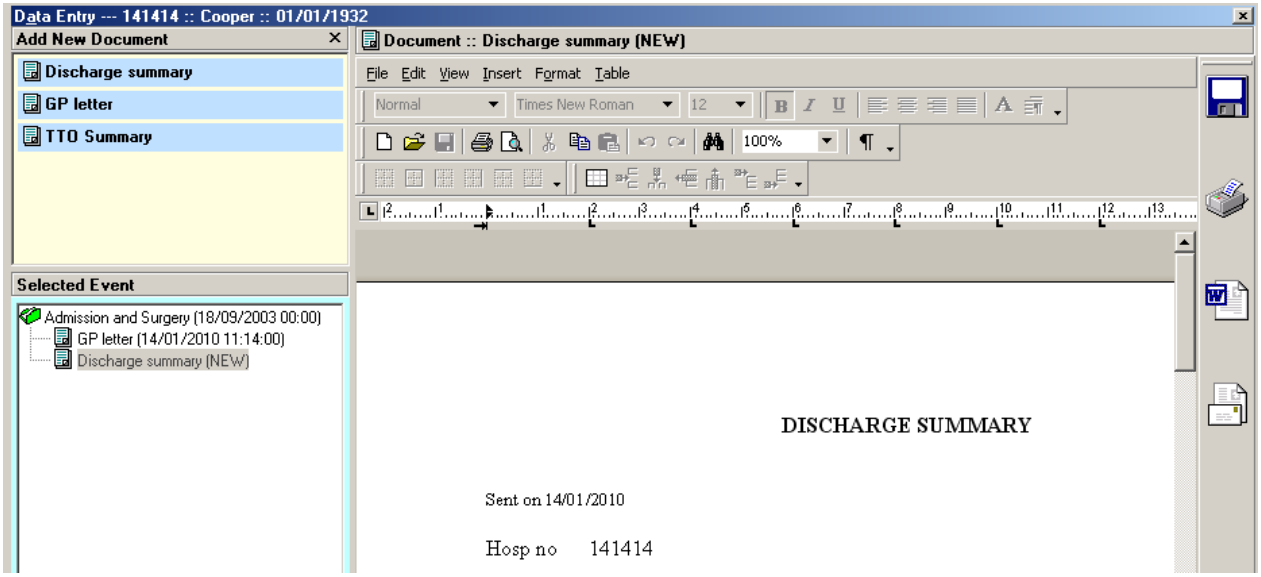




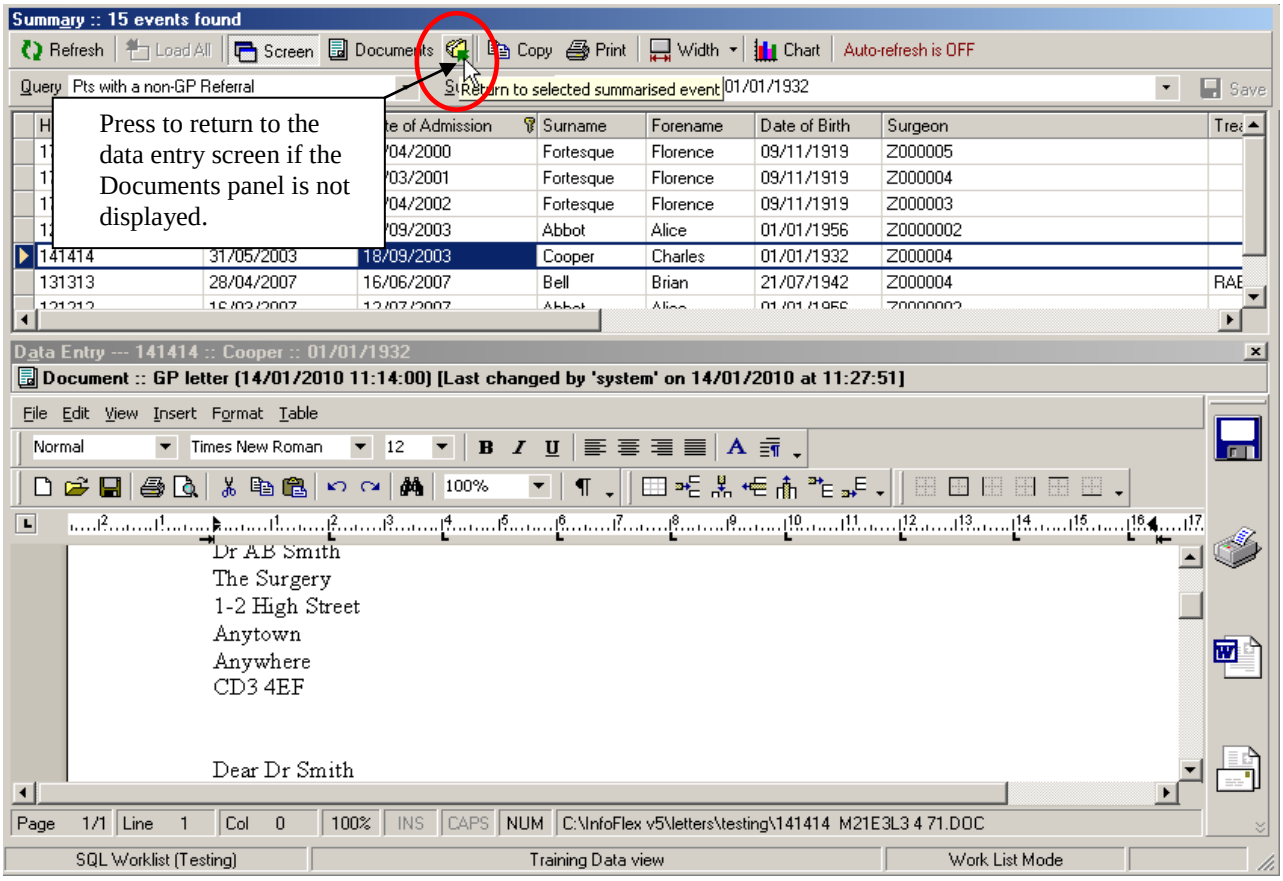
When you attach a new document, the standard confirmation message is displayed.



The document is displayed in the documents panel attached to the Selected Event and also in place of the data entry screen. The document can be edited and saved as normal.



If a document is currently displayed, and the Documents panel is not visible, then the user can return to the data entry screen for the selected event by clicking on the new **Return to selected summarized event** button on the summary grid toolbar.



4.11.1 Exercise

Display the **Training** data view and the **Referral Summary** summary view.

Select patient 171717 and display the Documents panel.

Generate some documents for the patient.

Note that the **Referral summary** document is non repeat and disappears from the available documents after it has been generated.

After generating a document, press the **Return to selected summarized event** button to display the patient event.

5 USING QUERIES WITH EVENT VIEW SUMMARIES

An **Event View Summary** can have multiple queries associated with it.

- The **query view** determines which data items are displayed in the summary grid.
- The **query filter** determines which subjects and which occurrences of the event view are displayed.

5.1 Domains and Data Views

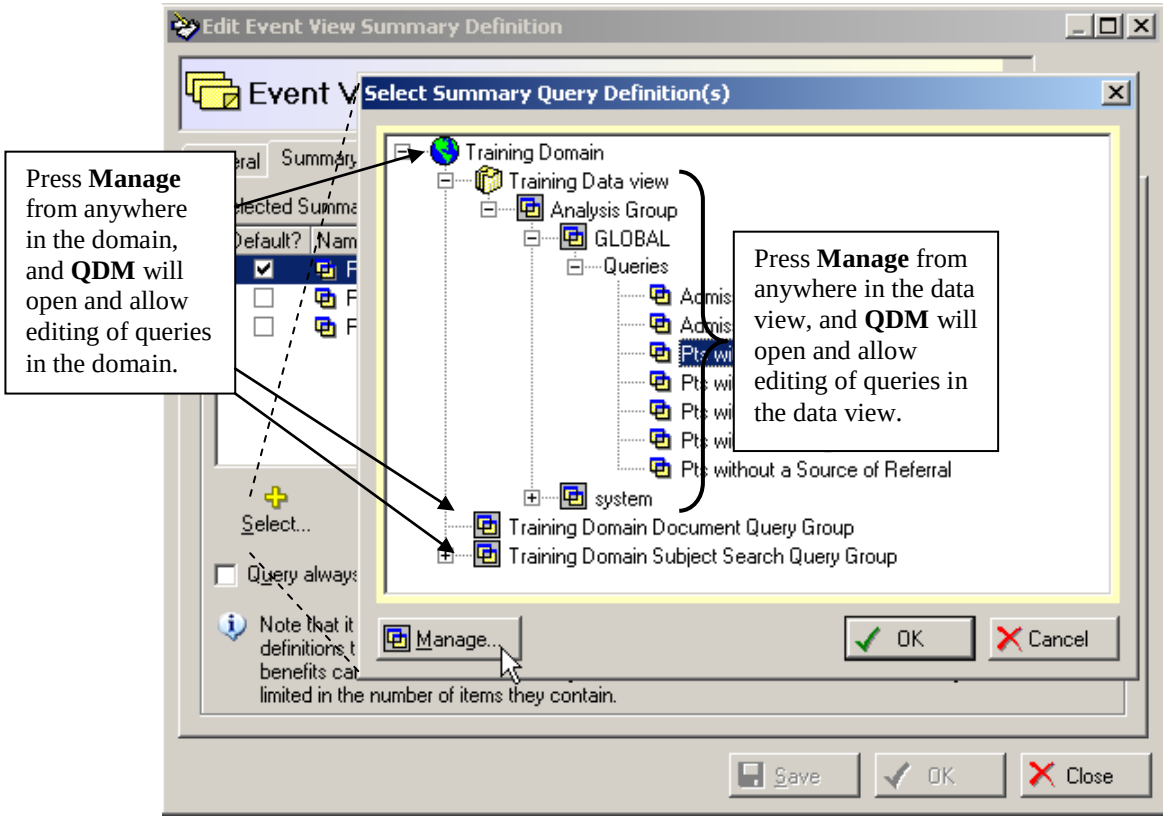
It is possible to select queries for event view summaries from both the current data view and also from the base domain.

5.1.1 Using the Select button on the Summary Queries tab

When you press the **Select** button on the **Summary Queries** tab of the **Edit Event View Summary Definition** window, the **Select Summary Query Definitions** window is displayed. This allows you to select queries defined in the document and subject search query groups of the domain as well as queries defined in the analysis query group of the current data view.

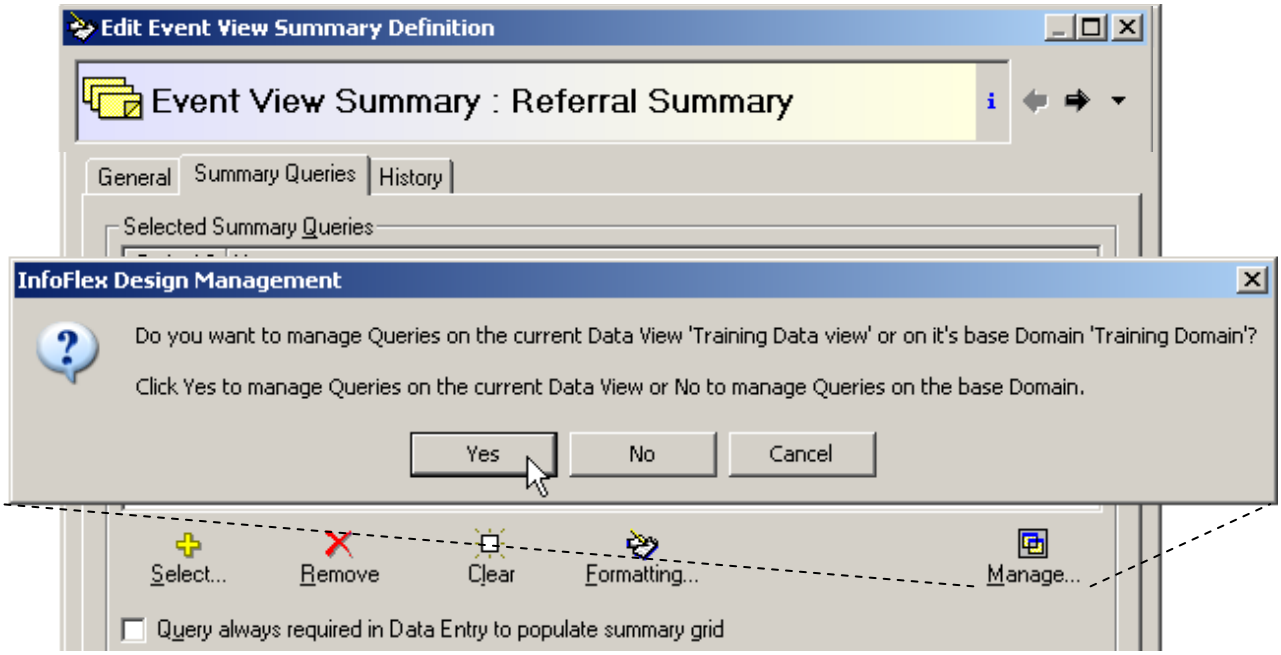
From the Select Summary Query Definitions window, if you highlight a domain-based query or any group heading in the domain and then press the **Manage** button, the QDM will be launched and display all domain-based queries. You can then add and edit queries in the domain.

Alternatively, if you select a data view-based query, or highlight any group heading in the data view and then press the **Manage** button, then the QDM will be launched and display all data view-based queries. You can then add and edit queries in the data view.


Edit Event View Summary Definition
Select Summary Query Definition(s)
Training Domain
Training Data view
Analysis Group
GLOBAL
Queries
Pts without a Source of Referral
system
Training Domain Document Query Group
Training Domain Subject Search Query Group
Press Manage from anywhere in the domain, and QDM will open and allow editing of queries in the domain.
Press Manage from anywhere in the data view, and QDM will open and allow editing of queries in the data view.
Select...
Manage...
OK
Cancel
Save
OK
Close

5.1.2 Using the Select button on the Summary Queries tab

When you press the **Manage** button on the **Summary Queries** tab, you are prompted to decide whether you wish to view data view queries in Query Design manager or whether you wish to view domain queries.


Edit Event View Summary Definition
Event View Summary : Referral Summary
General
Summary Queries
History
Selected Summary Queries
InfoFlex Design Management
Do you want to manage Queries on the current Data View 'Training Data view' or on it's base Domain 'Training Domain'?
Click Yes to manage Queries on the current Data View or No to manage Queries on the base Domain.
Yes
No
Cancel
Select...
Remove
Clear
Formatting...
Manage...
Query always required in Data Entry to populate summary grid

5.1.3 Item names in the Work List Grid

The grid in the Data Entry and Work List modules displays **panel** item names rather than data item names in the grid column headers (ie the item names in the data view rather than the item names in the domain).

Note that this is only the case for columns where the query view item is an actual data item. Any columns where the query view item is a calculated or expression column or has had an alias set as part of the query view definition will keep the item name given in the query view.

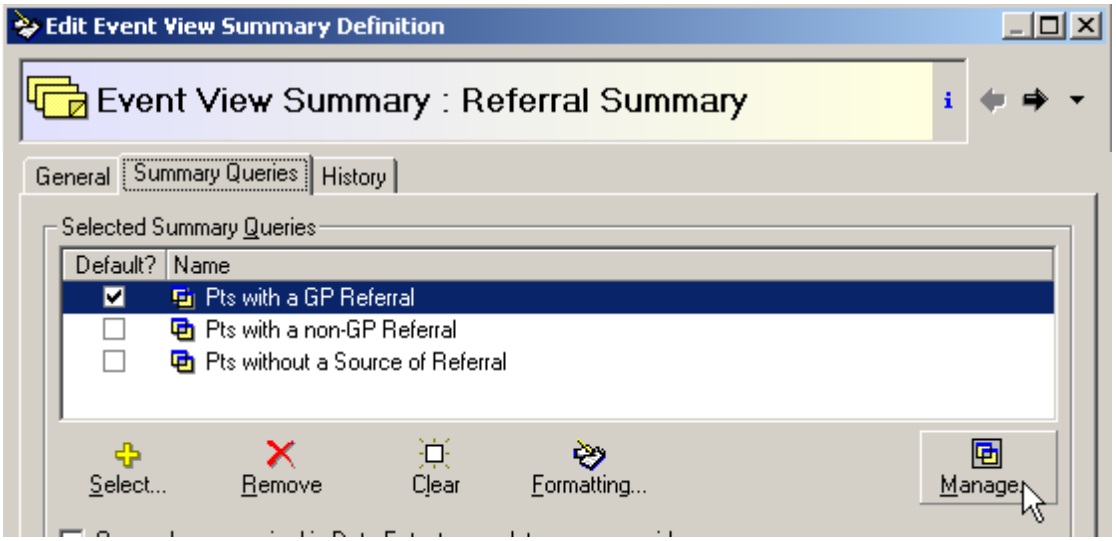
5.2 Multiple queries in an Event View Summary

5.2.1 Creating multiple queries

In this exercise, we shall create two additional queries in the Referral Summary event view summary - the first for patients with an A&E referral, the second for patients with a General Surgeon source of referral.

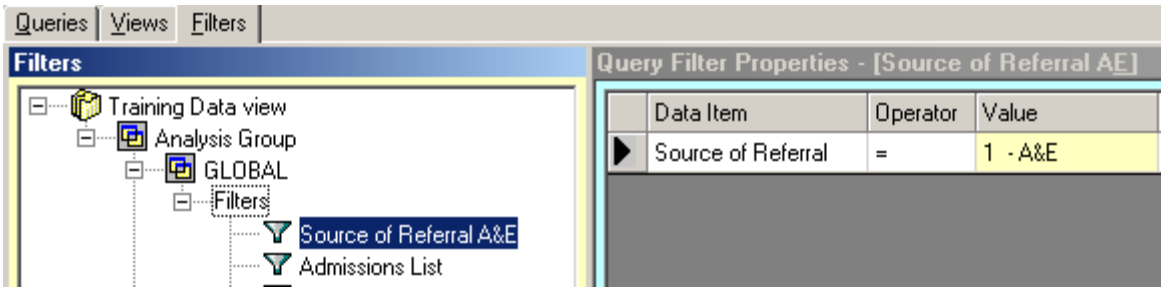
➢ In **Design Management**, display the **Training** data view and edit the **Referral Summary** Event View Summary.

➢ Go to the **Summary Queries** tab. Currently three queries are defined.

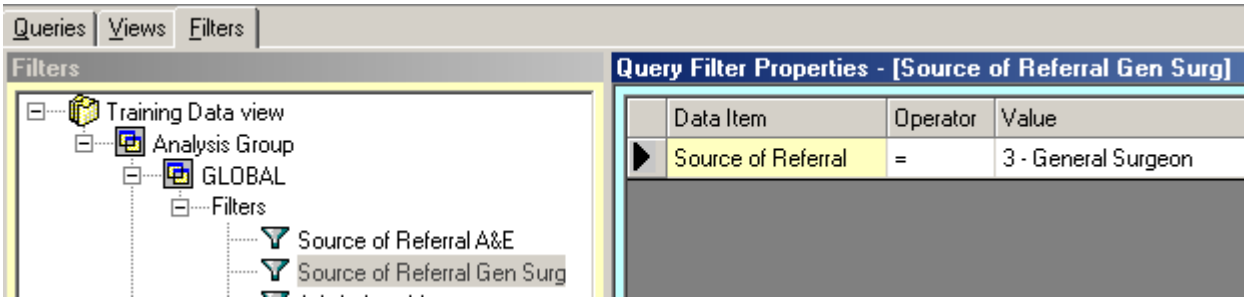


➢ Press **Manage** then **Yes** to display **Query Design Manager** for the data view.

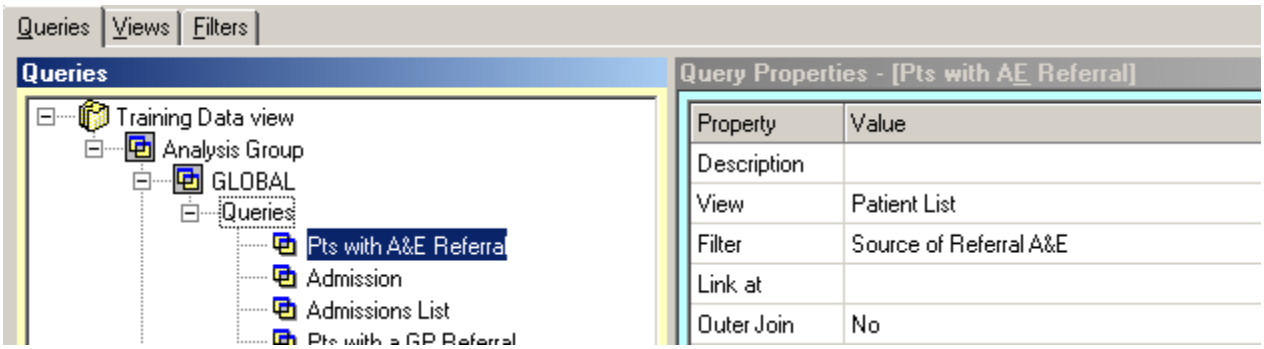
➢ Go to the **Filters** tab and define a new filter called **Source of Referral A&E** with the criteria **Source of Referral = 1 – A&E**.



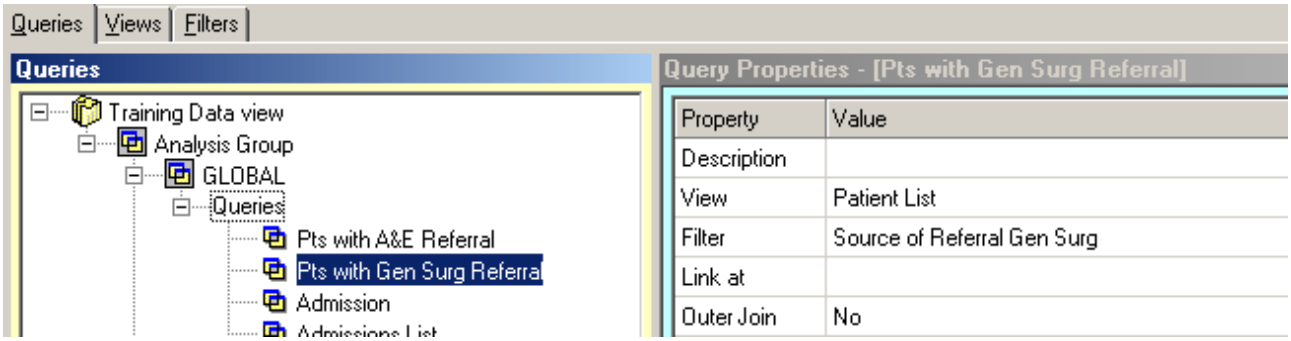
➢ Define another filter called **Source of Referral Gen Surg** with the criteria **Source of Referral = 3 – General Surgeon.**



➢ Go to the **Queries** tab and define a query called **Pts with A&E referral**. Use the **Patient List** view and the **Source of Referral A&E** filter. Set the **Outer Join** to **No**.

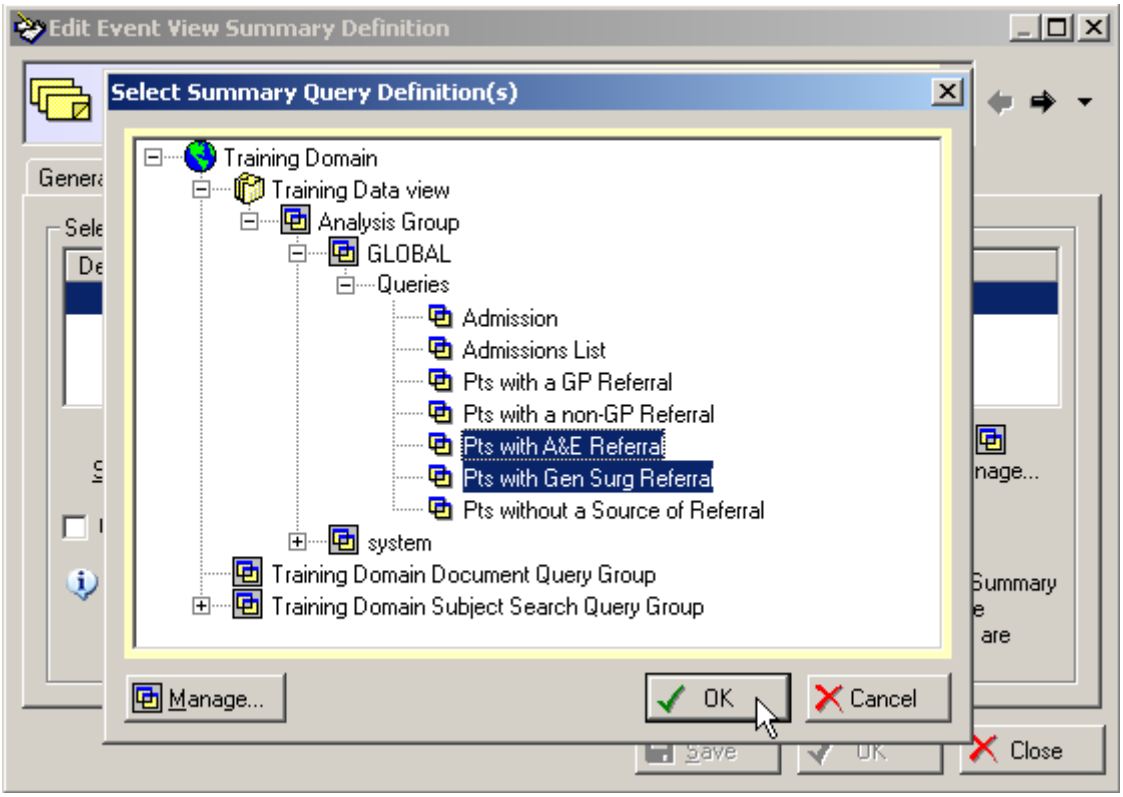


➢ Define another query called **Pts with Gen Surg Referral**. Use the **Patient List** view and the **Source of Referral Gen Surg** filter.

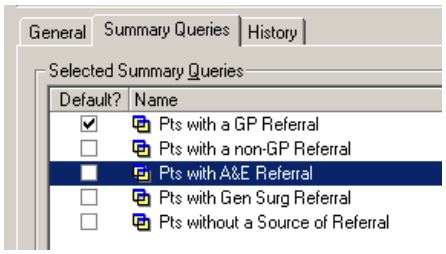


➢ Close the **Query Design Manager** and press the **Select** button on the **Summary Queries** tab.

➢ Select the two new queries (use the ctrl key to multi-select) and press the **OK** button.



The queries are now displayed on the **Summary Queries** tab.

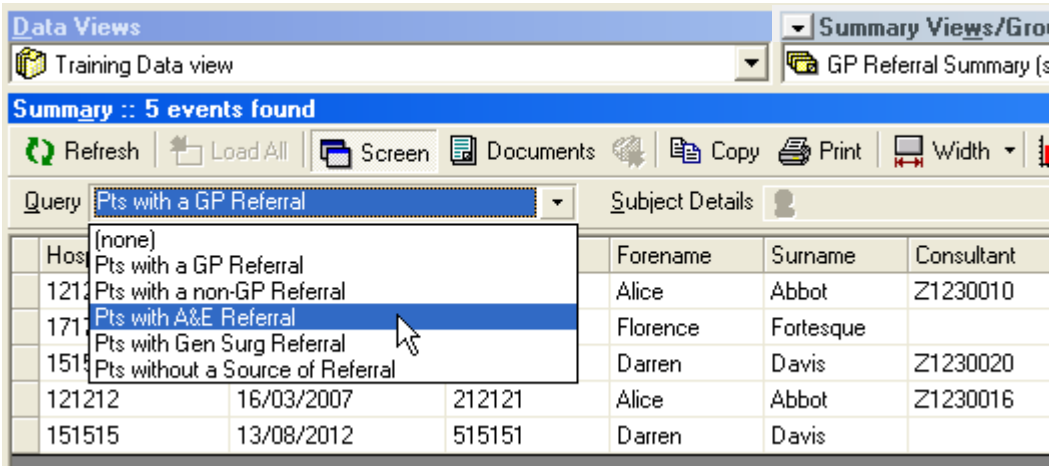


➢ Save and close the Event View Summary definition.

5.2.2 Viewing multiple queries in the Work List module

➢ Go to the Work List module and select the **Training** data view and the **Referral Summary** summary view. Note that there are now more queries available.

➢ Choose the different queries and see how the data in the grid changes.



5.3 Prompt queries

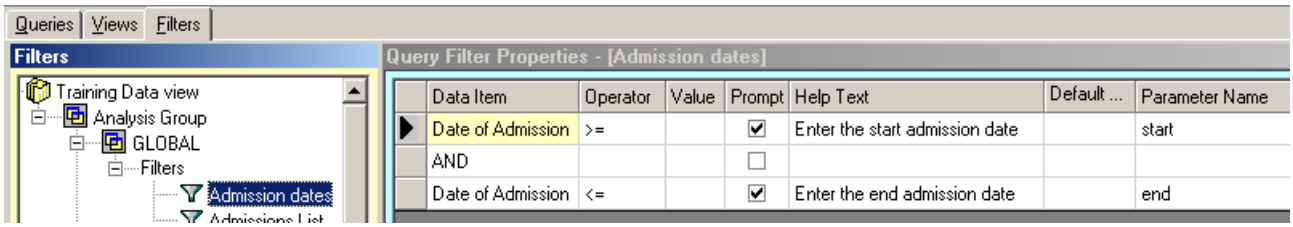
5.3.1 Creating prompt queries

In this example, we shall create a query which prompts the user to enter parameters.

➢ Go to **Design Management**, display the **Training** data view and edit the **My Admissions Summary** Event View Summary.

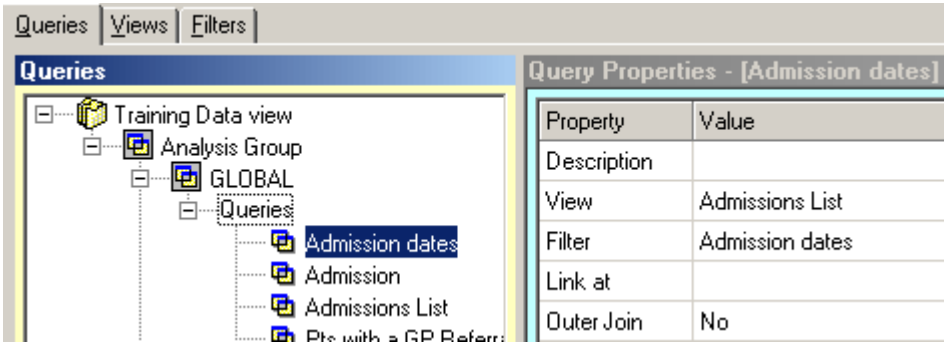
➢ Go to the **Summary Queries** tab and press the **Manage** button then **Yes** to display QDM for the data view.

➢ Create an **Admission Dates** filter which prompts for **Date of Admission** (Admission & Surgery event) **start** and **end** dates:



➢ **Save** the Filter

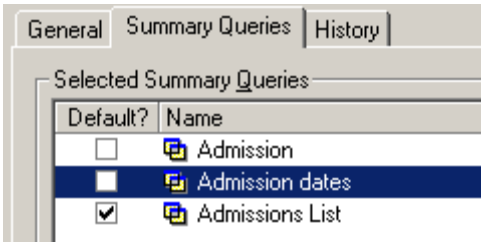
➢ Create an **Admission Dates** query using the **Admissions List** view and the **Admission Dates** filter. Change the **Outer Join** to **No**:



➢ **Save** the query.

➢ Test the query using a start date of 01/01/2000 and an end date of today, and ensure that records are returned.

➢ Select the query and ensure it appears on the **Summary Queries** tab.



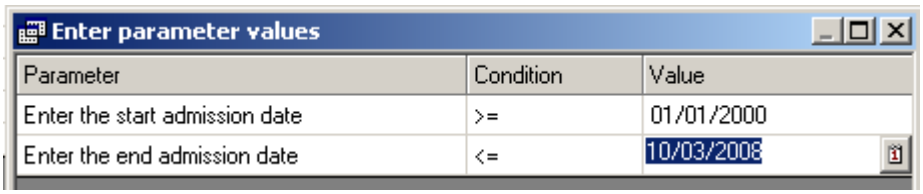
5.3.2 Viewing prompt queries in the Work List module

➢ Go to the Work List module and select the **Training** data view and the **My Admissions Summary** summary view.

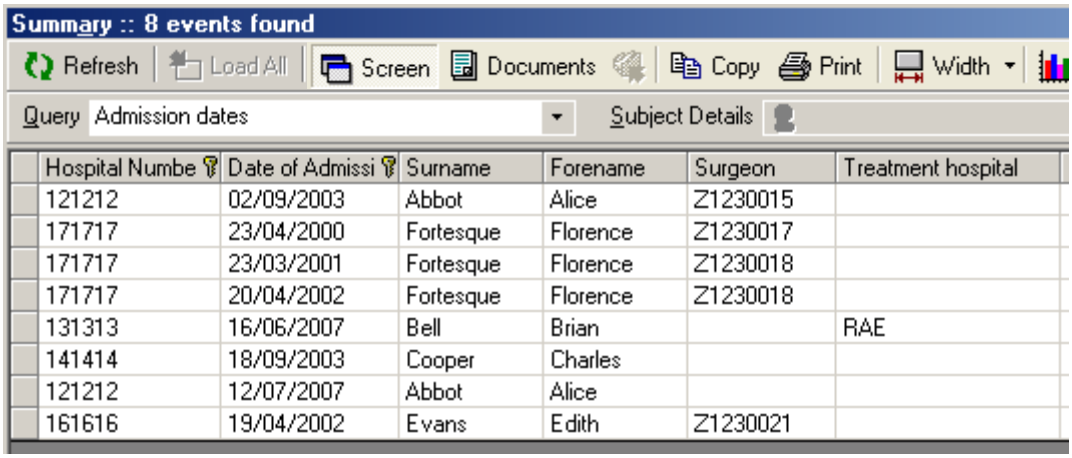
➢ Select the **Admission dates** query.

The **Enter parameter values** window is displayed and you must enter criteria.

➢ Enter a **Start Admission date** of **01/01/2000** and an **End Admission date** of **today** in the parameter window:



The **Summary grid** displays all event views which have an **Admission date** between the dates specified in the parameter:



Hospital Numbe	Date of Admissi	Surname	Forename	Surgeon	Treatment hospital
121212	02/09/2003	Abbot	Alice	Z1230015	
171717	23/04/2000	Fortesque	Florence	Z1230017	
171717	23/03/2001	Fortesque	Florence	Z1230018	
171717	20/04/2002	Fortesque	Florence	Z1230018	
131313	16/06/2007	Bell	Brian		RAE
141414	18/09/2003	Cooper	Charles		
121212	12/07/2007	Abbot	Alice		
161616	19/04/2002	Evans	Edith	Z1230021	

5.4 Editing data used by the query filter

If you are editing the data displayed in the grid, and you edit the data such that it no longer meets the criteria specified in the query filter, then on saving, that row will disappear from the grid.

This is true whether the query is a normal query or a prompt query.

If other users are also editing the data that is displayed in the grid, then if you carry out a **Refresh** (or if an **auto-refresh** occurs), the rows in the grid will be updated to reflect the latest data. Rows will be removed if they no longer meet the filter criteria and new rows will be displayed if another user has added data that meets the criteria.

5.5 Guidelines for creating queries

Work List queries should focus on showing the event view that has been selected as the summarised event view. Ideally, the results of the query should contain one of the summarised event views in every row of the results but the same summarised event view should only appear once in the results.

Users should be aware that some query results (eg where outer joins are used) can display rows in the grid for which there is no summarised event view, and other query results (eg where the view includes data items from a repeat child event view) might display the summarised event view several times. Both these instances can be confusing for the user and can be prevented.

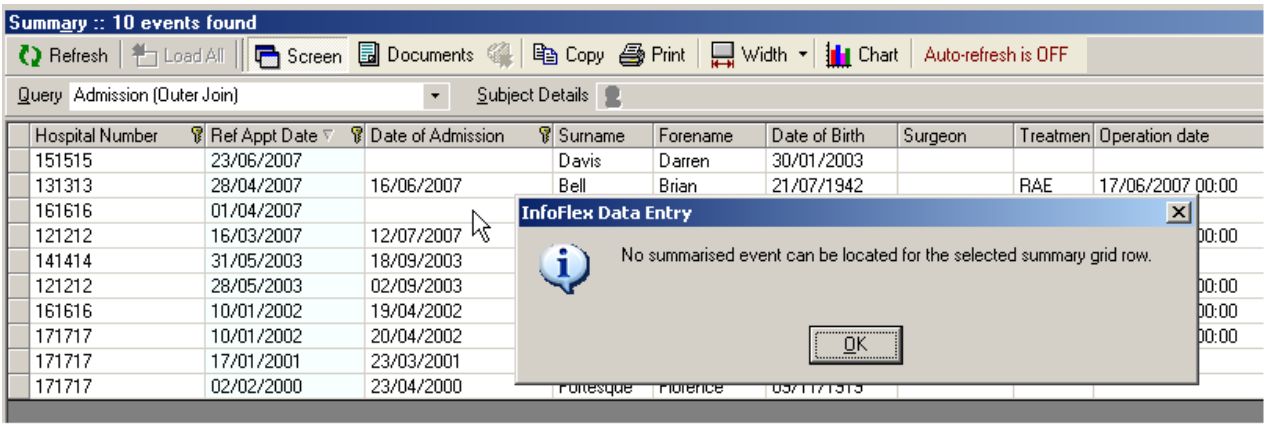
Example 1

In this example, using this data view design:

the summarised event view is the Admission and Surgery event view.

If an **outer join** is used in the query, the grid displays all patients even though some do not have an Admission and Surgery event view.

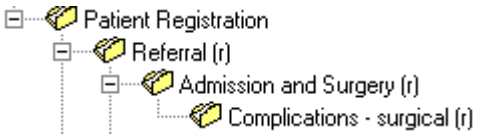
The data entry screen cannot therefore display a summarised event view for those rows and on selection of such a row, a warning message is displayed.



This can be prevented from happening by using an **inner join**.

Example 2

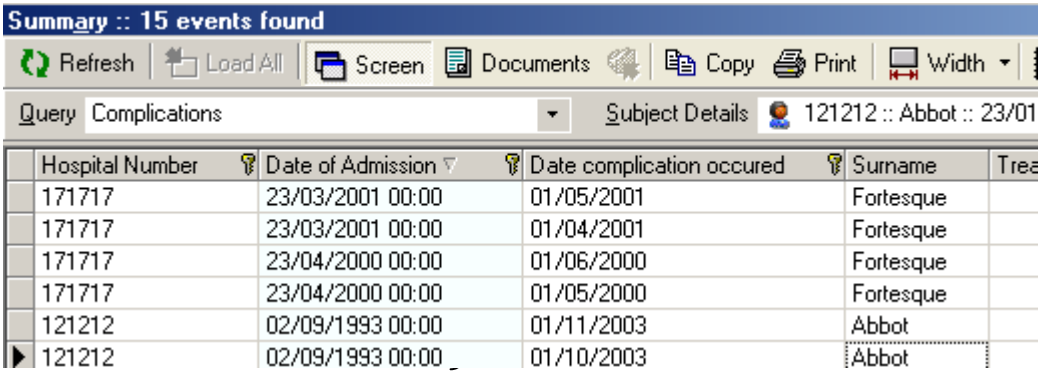
In this example, using this data view design:



the summarised event view is the **Admission and Surgery** event view.

The query view includes items from the repeat child event view **Complications**. Where a subject has two **Complications** event views attached to the same **Admission and Surgery** event view, two rows are displayed in the grid - one for each **Complications** event view.

This means that the summarised **Admission and Surgery** event view is displayed twice in the grid which could be confusing for the user.



Hospital Number	Date of Admission	Date complication occured	Surname	Trea
171717	23/03/2001 00:00	01/05/2001	Fortesque	
171717	23/03/2001 00:00	01/04/2001	Fortesque	
171717	23/04/2000 00:00	01/06/2000	Fortesque	
171717	23/04/2000 00:00	01/05/2000	Fortesque	
121212	02/09/1993 00:00	01/11/2003	Abbot	
121212	02/09/1993 00:00	01/10/2003	Abbot	

Whilst this scenario is possible, it could be confusing to display child event views of a summarised event view if this causes the summarised event to be repeated, so it is recommended that items from repeat child event views are not included in the query view.

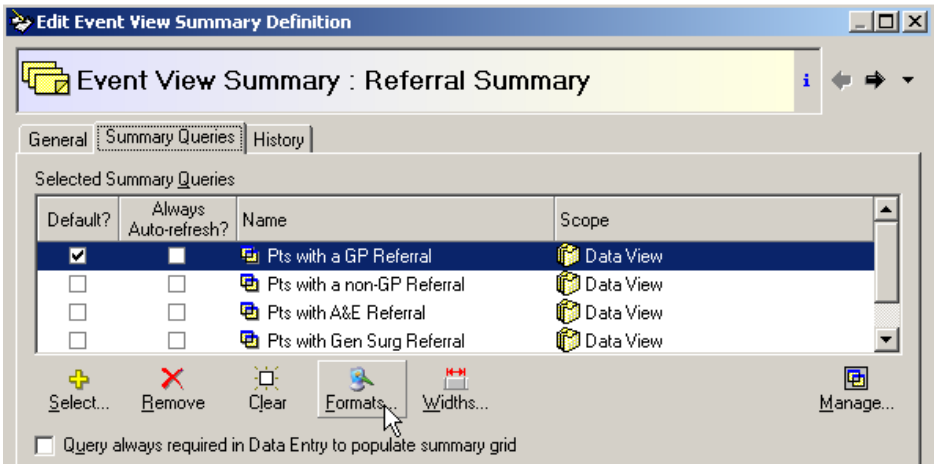
6 CONDITIONAL FORMATTING

It is possible to define conditional formatting in the Work List module. The format of a row in the grid can be changed if it fulfils a certain condition. The background, foreground and font style can be changed, and an icon can be displayed. You can choose whether to change the formatting only of the cell that meets the condition, or of the whole row.

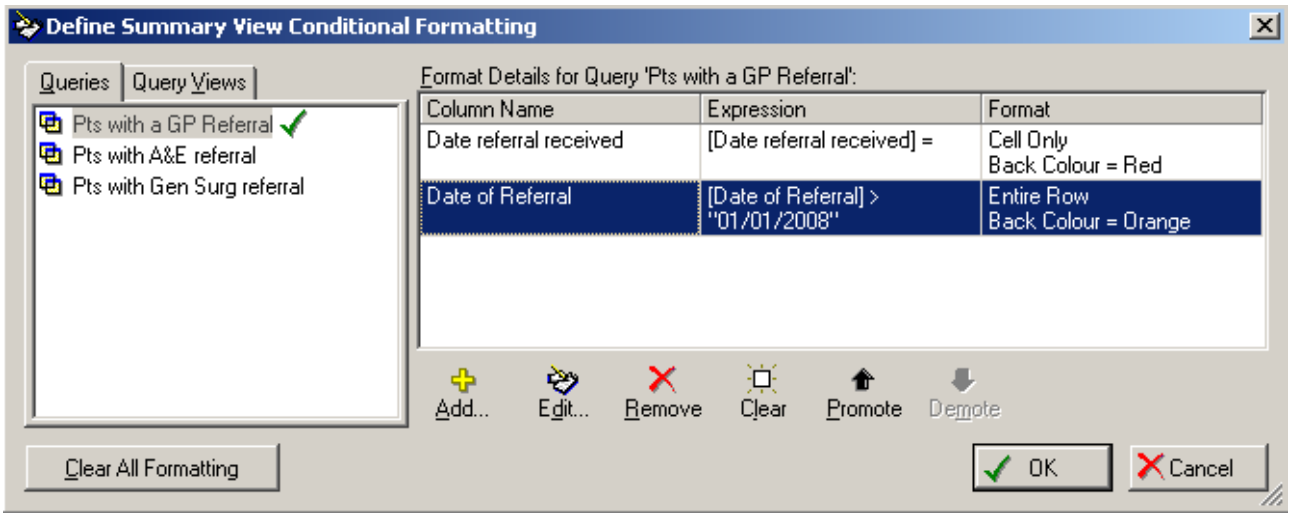
6.1 Defining Conditional Formatting in Design Management

6.1.1 Defining the condition and formatting

To define conditional formatting, display the **Event View Summary definition**, go to the **Summary Queries** tab and press the **Formats** button. (The **Formats** button is only enabled if at least one query has been defined).

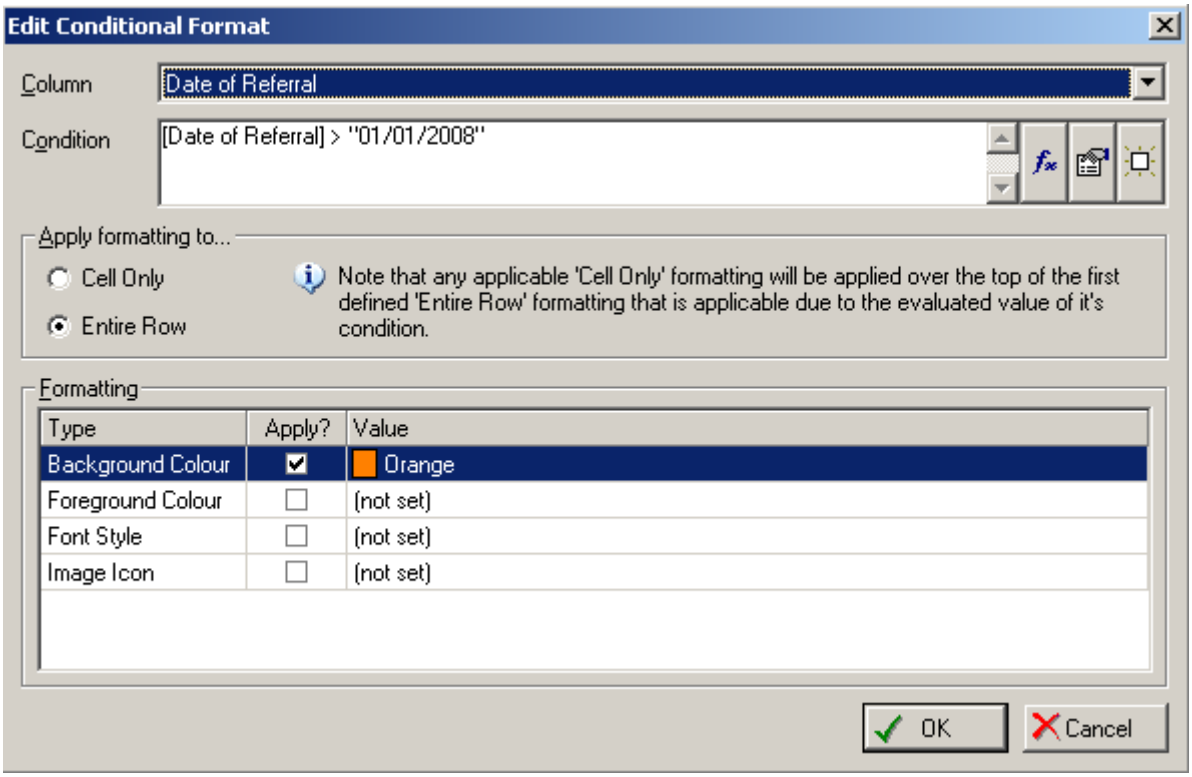


The **Define Summary View Conditional Formatting** window is displayed. A green tick indicates which query views or queries have formatting defined against them.



Conditional formatting can be defined for queries (on the **Queries** tab) or for query views (on the **Query Views** tab). When the grid is displayed in the work list module, any formatting defined for the current query is displayed. If no formatting is defined for the query, then any formatting defined for the query view is displayed. (For example, if the same query view is used in several queries, then if you define the formatting for the query view, that formatting will be applied to all queries using that view, as long as the queries themselves don't have any formatting defined).

When you add or edit conditional formatting, the **Conditional Format** window is displayed.



Conditional formatting is based on a column. This can be a data item or an expression in the data view. The **Column** dropdown contains a list of the items in the query or query view you have chosen.

The **Condition** box defines the condition which must be met in order for the formatting to be applied.

The **Apply formatting to…** box indicates whether the formatting will be applied to a single cell or to the entire row.

The **Formatting** section details the formatting that will be applied when the condition is met.

Background colour changes the background of the cell or row.

Foreground colour changes the font colour.

Font Style changes the style of the font to bold, italic, underline and/or strikethrough.

Image Icon displays an image in the cell (if Single Cell formatting) or beginning of the row (if Entire Row formatting).

6.1.2 Managing conditional formatting

The **Define Summary View Conditional Formatting** window allows you to added, edit, remove, clear and order conditional formatting.

Add allows you to add a new conditional format.
Edit allows you to edit an existing conditional format.
Remove removes a single conditional format
Clear removes all formatting for the selected query or query view.
Promote moves a conditional format up in the order
Demote moves a conditional format down in the order

Multiple conditional formats

The order of the conditional formats is particularly important for Entire Row formats. The **Promote** and **Demote** buttons reorder the formats.

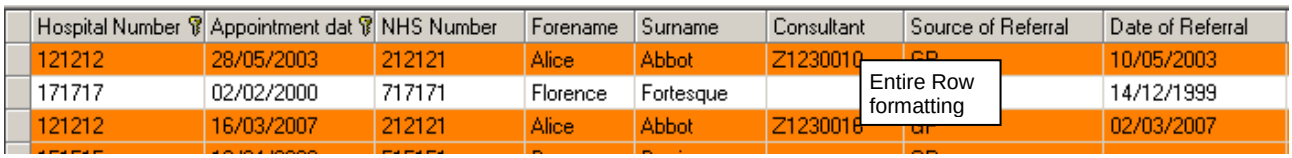
In the Work List and Data Entry modules, where several conditional formats are defined, the order of the formats is taken into account when applying the formatting to the grid. For each row in the grid, the first Entire Row format whose condition is met is applied and the remaining Entire Row formats are ignored for that row.

Cell Only formatting is shown on top of Entire Row formatting.

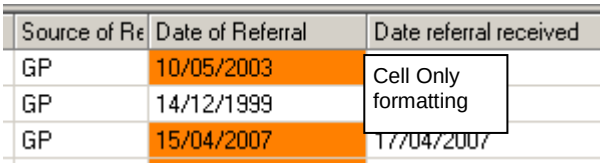
6.2 Viewing Conditional Formatting in the Work List module

6.2.1 How conditional formatting is displayed

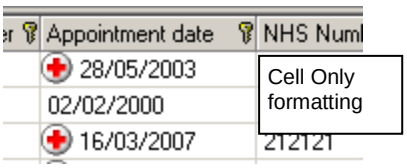
Where Entire Row formatting has been defined, then where a cell meets the condition, formatting is displayed for the entire row where the condition is met.

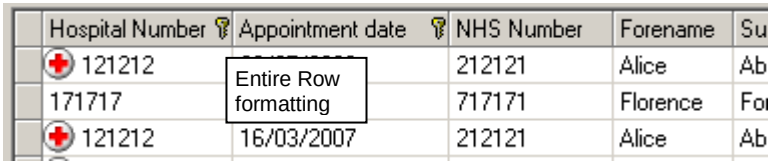


Where Cell Only formatting has been defined, then where a cell meets the condition, formatting is only applied to the cell where the condition is met.



However, where image icons have been defined, then for Cell Only formatting the image is displayed in the cell but for Entire Row formatting the image is displayed at the beginning of the row only.





6.2.2 Multiple conditional formats

Multiple Entire Row formats

Where several conditional formats are defined, the order of the formats (set in Design Management) is taken into account. For each row, the first Entire Row format whose condition is met is applied and the remaining Entire Row formats are ignored for that row.

In this example, the following conditional formats are applied to the Date of Referral item:

Format Details for Query 'Pts with a GP Referral':

Column Name	Expression	Format
Date of Referral	[Date of Referral] > "01/01/2005"	Entire Row Back Colour = Red
Date of Referral	[Date of Referral] > "01/01/2000"	Entire Row Back Colour = Orange

The Work List grid is displayed like this:

Source of Re	Date of Referral	Date
GP	10/05/2003	11/05
GP	14/12/1999	
GP	15/04/2007	17/04
GP	10/06/2007	12/06
GP	02/03/2007	02/03

Cell Only formatting with Entire Row formatting

Cell Only formatting is shown on top of Entire Row formatting.

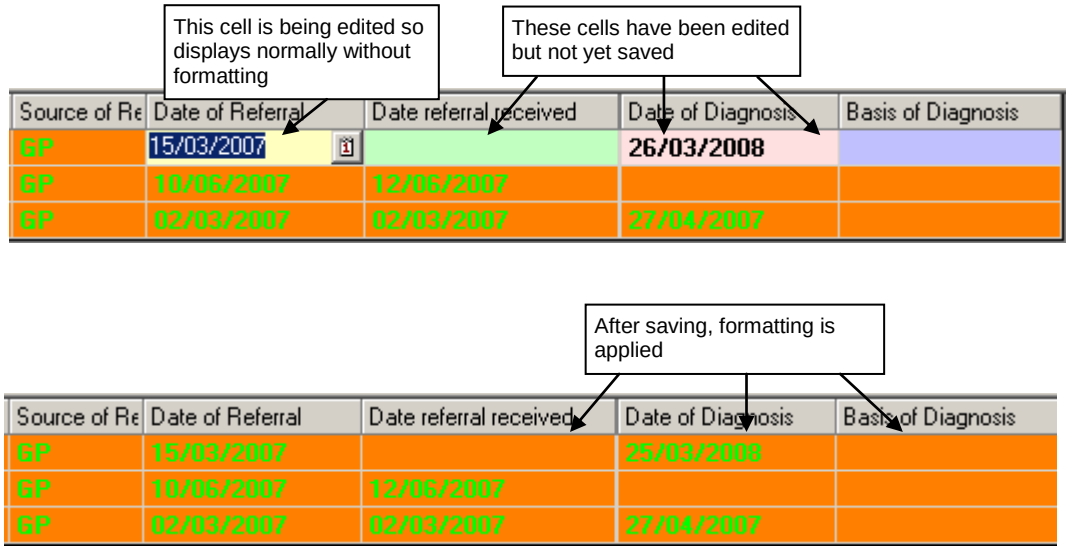
In the above example, if Cell Only formatting is chosen for the first condition, the grid is displayed like this (the Cell Only format hides the Entire Row format in the cell that meets the condition):

Source of Re	Date of Referral	Date referral received	D
GP	10/05/2003	11/05/2003	
GP	14/12/1999		
GP	15/04/2007	17/04/2007	
GP	10/06/2007	12/06/2007	
GP	02/03/2007	02/03/2007	

6.2.3 Editing data when Conditional Formatting is switched on

When data is edited,

- whilst a cell is being edited, it displays in normal style without any conditional formatting
- before changes are saved, changed cells are shown in red as usual, and will therefore temporarily lose any back and fore colours but they will display any font style and icon.
- any cells marked missing an unknown display the missing and unknown colours until they are saved.
- if the cell or row meets the condition in the current query or query view, the formatting will be applied on saving. Similarly if a cell no longer meets the condition then after saving the formatting will be removed.



6.2.4 Other grid behaviour

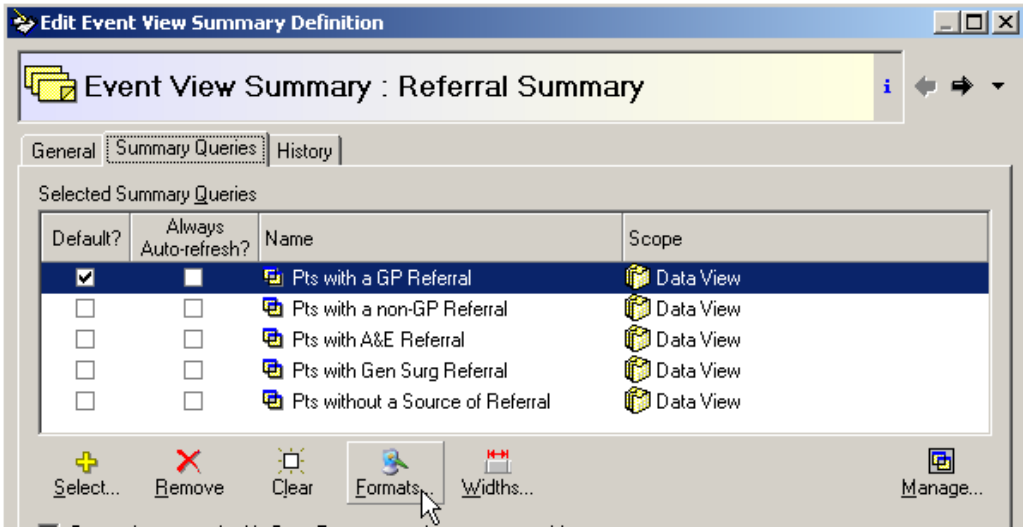
When conditional formatting is applied:

- the summary grid no longer highlights the sorted column in light blue
- conditional formatting background colours over-ride the missing and unknown colours

6.3 Training Exercise – defining conditional formatting

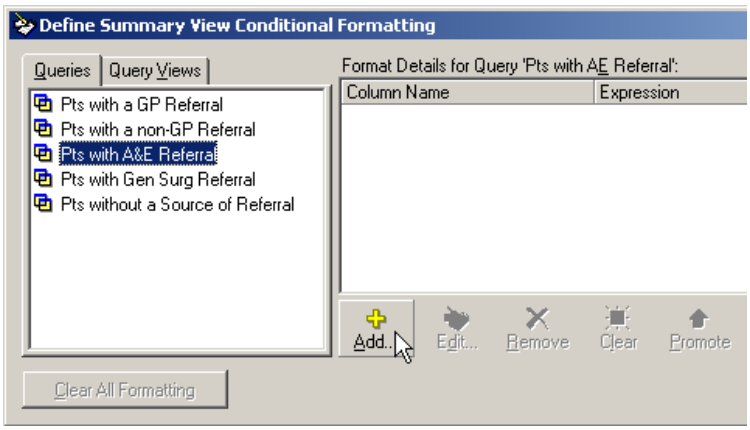
➢ Go to Design Management, display the **Training** data view, open the **Referral Summary** summary view definition and go to the **Summary Queries** tab.

➢ Press the **Formats** button.



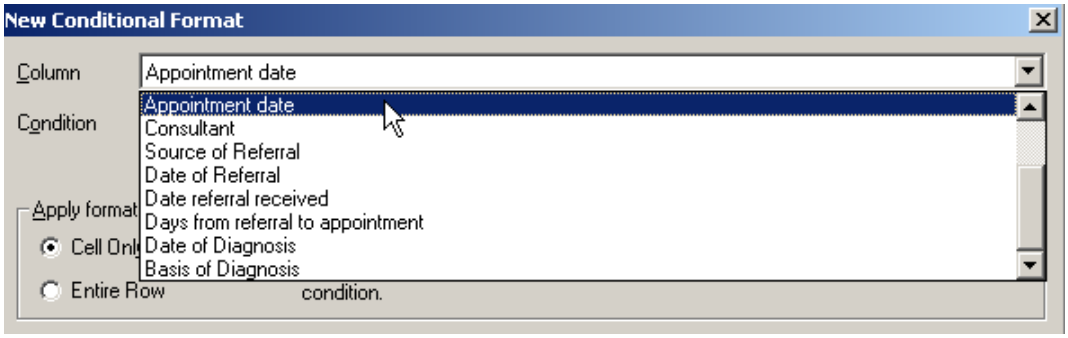
The **Define Summary View Conditional Formatting** window is displayed.

➢ Highlight the **Pts with A&E Referral** query and press the **Add** button.



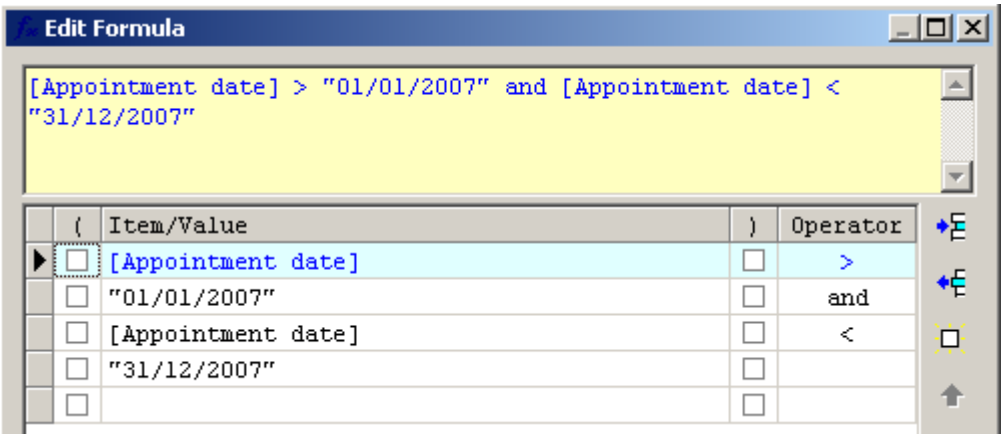
The **Conditional Format** window is displayed.

➢ In the **Column** field, choose **Appointment Date**.

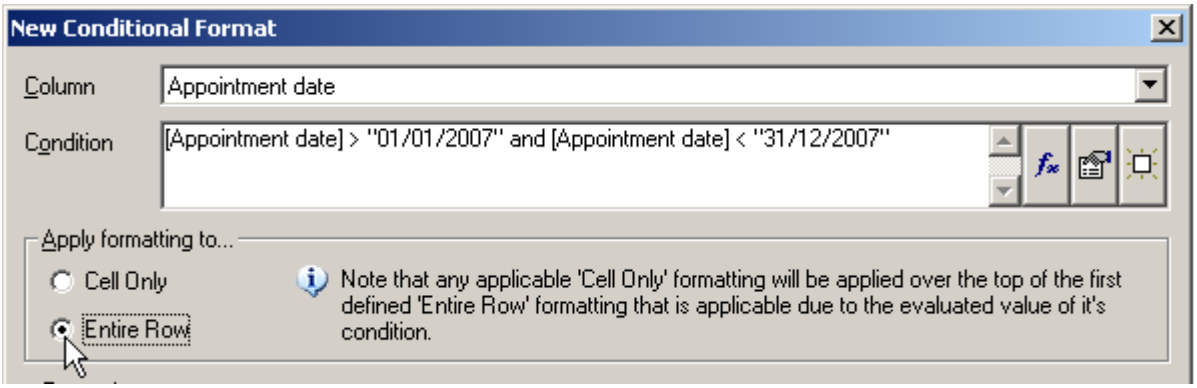


- In the **Condition** field, press the ***fx*** button.

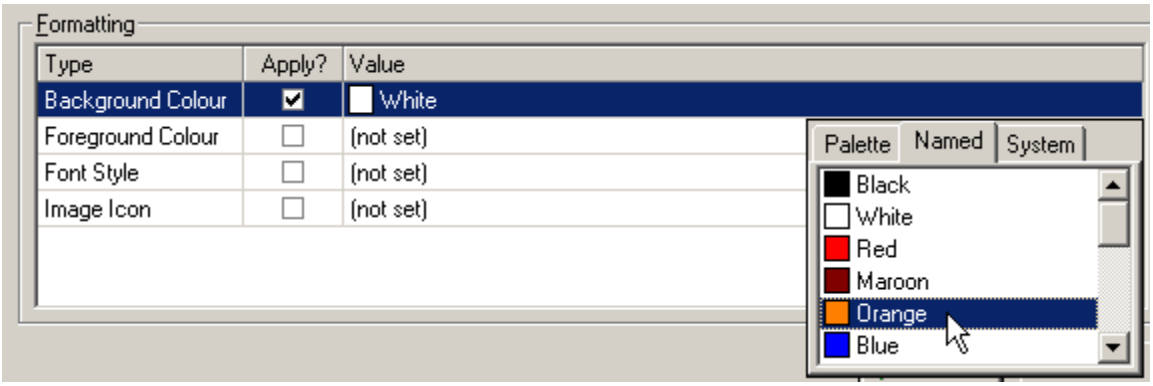
- Define the condition shown below that Appointment Date must be in 2007.



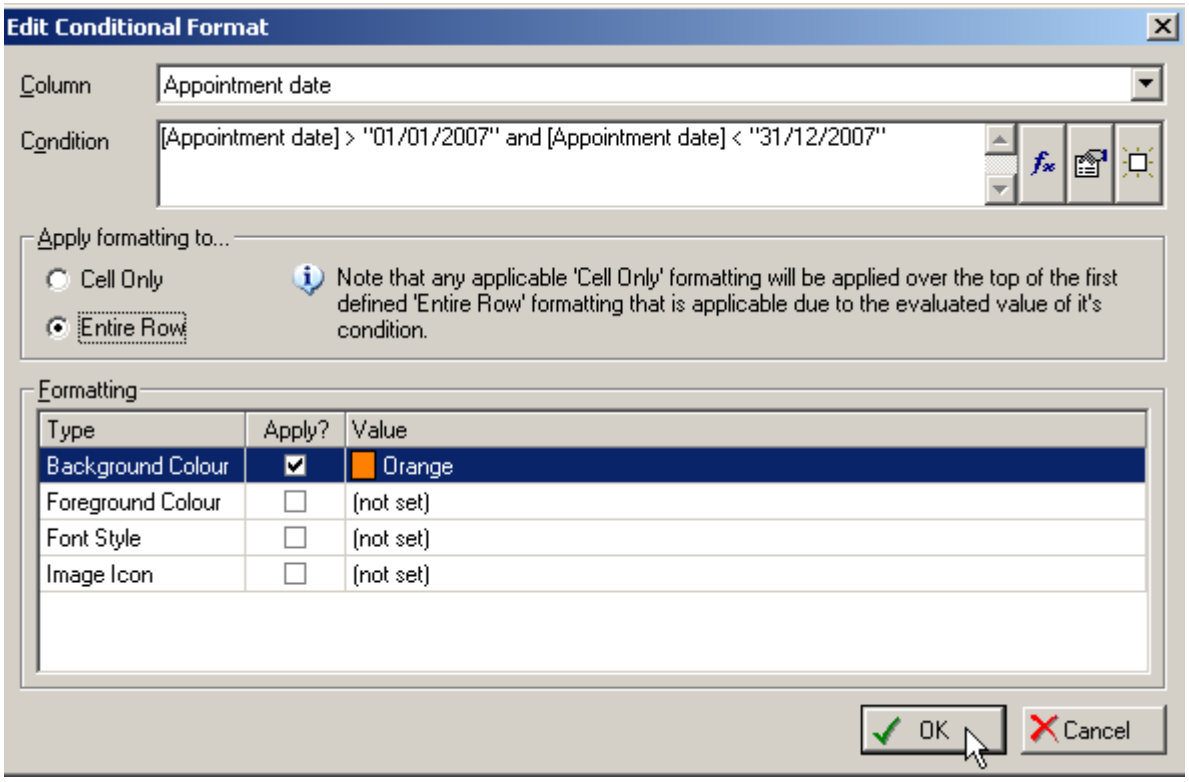
- In **Apply formatting to…** choose **Entire Row**.


New Conditional Format
Column
Appointment date
Condition
[Appointment date] > "01/01/2007" and [Appointment date] < "31/12/2007"
Apply formatting to...
Cell Only
Entire Row
Note that any applicable 'Cell Only' formatting will be applied over the top of the first defined 'Entire Row' formatting that is applicable due to the evaluated value of it's condition.

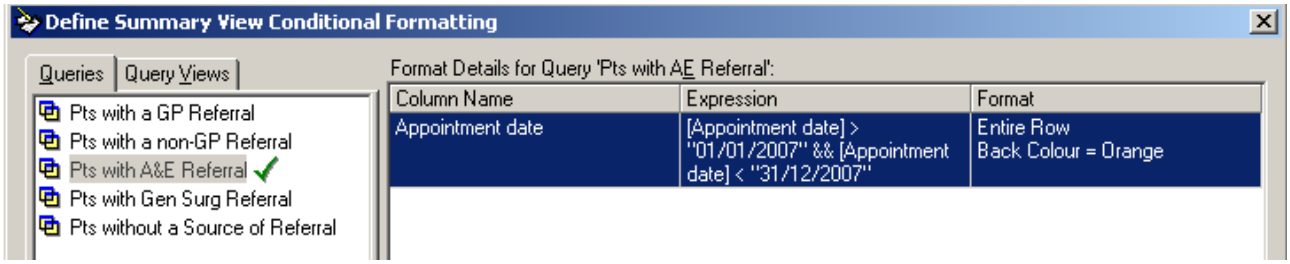
- In **Formatting**, for the **Background Colour** tick the **Apply?** column and then choose Orange for the background colour.



➢ Now that you have defined your first conditional format, press the OK button.

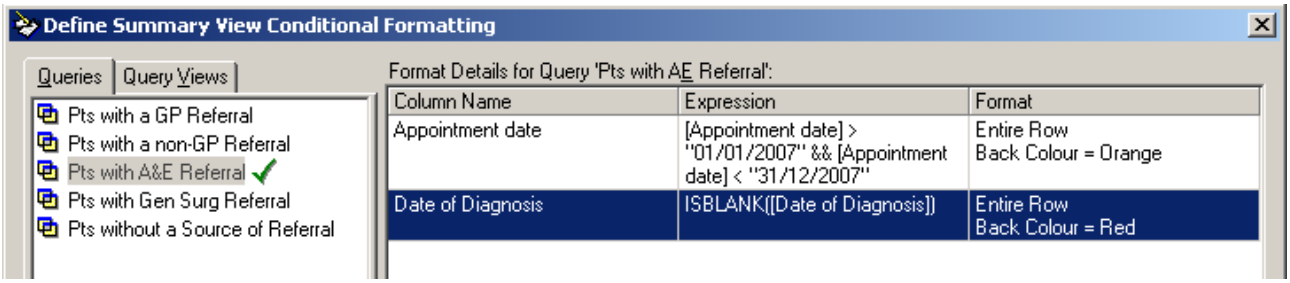


The conditional format is displayed on the **Define Summary View Conditional Formatting** window. A green tick against the query indicates that formatting has been defined for that query.



➢ Add another condition for the **Pts with A&E referral**.

➢ For the **Date of Diagnosis** set a condition such that when Date of Diagnosis is blank, the entire row has a red background.

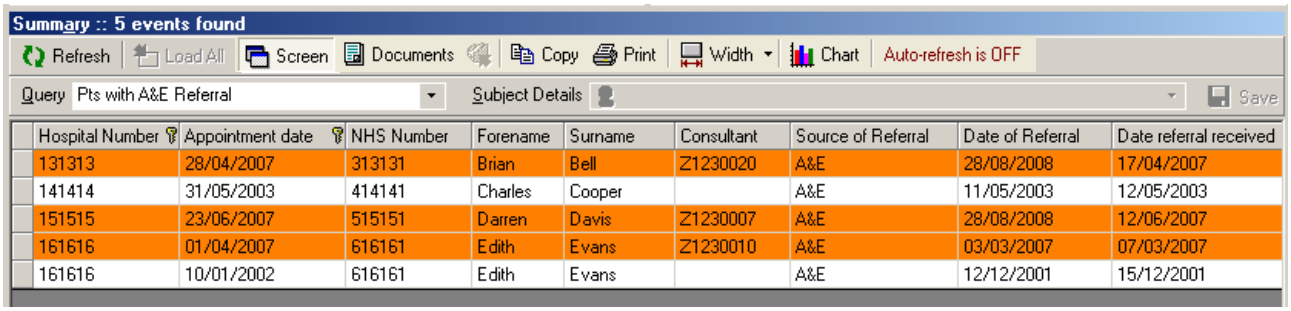


➢ Go to the Work List module and switch on **Show Conditional Formatting** in the **View** menu.

➢ Display the **Referral Summary** summary view and the **Pts with A&E referral** query.

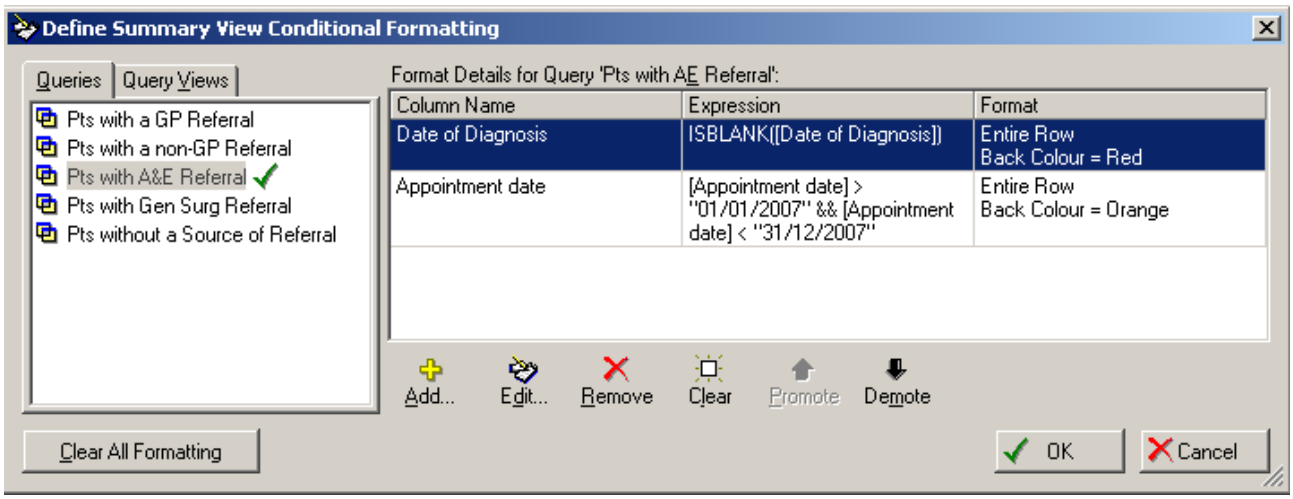
➢ Check that the formatting is applied.

You should find that the three rows where the Date of Referral is in 2007 are highlighted in orange. The rows where Date of Diagnosis is blank are not shown in red, because each of those rows met the previous condition and the first condition that is met is applied.



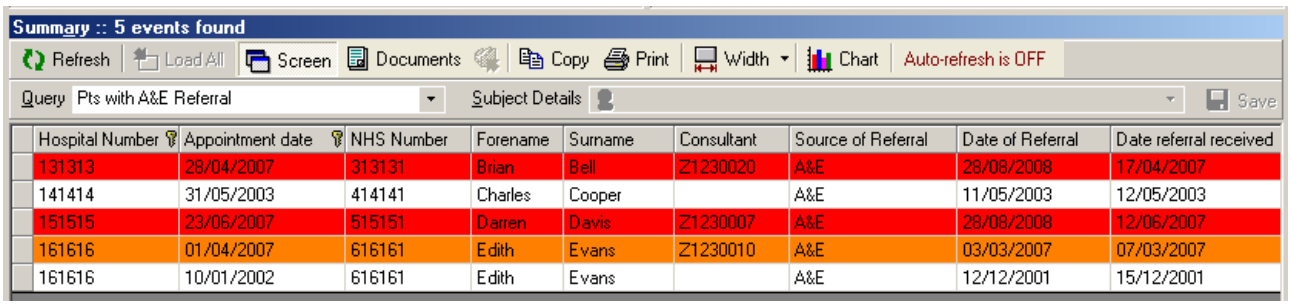
Hospital Number	Appointment date	NHS Number	Forename	Surname	Consultant	Source of Referral	Date of Referral	Date referral received
131313	28/04/2007	313131	Brian	Bell	Z1230020	A&E	28/08/2008	17/04/2007
141414	31/05/2003	414141	Charles	Cooper		A&E	11/05/2003	12/05/2003
151515	23/06/2007	515151	Darren	Davis	Z1230007	A&E	28/08/2008	12/06/2007
161616	01/04/2007	616161	Edith	Evans	Z1230010	A&E	03/03/2007	07/03/2007
161616	10/01/2002	616161	Edith	Evans		A&E	12/12/2001	15/12/2001

➢ Go to Design Management and adjust the order of the conditions. Use the **Promote** button to move the **Date of Diagnosis** condition to the top of the list.



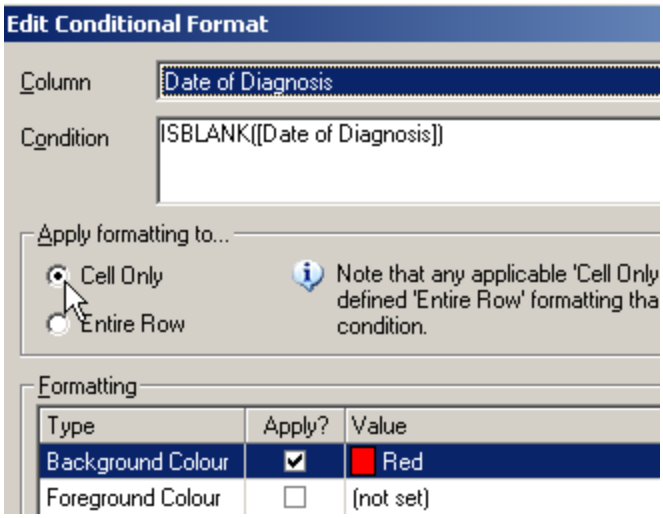
➢ Go back to the Work List module and check that the formatting is applied.

You should find that the rows where Date of Diagnosis is blank are now shown in red, because that condition is now the first that is met for that row.



Hospital Number	Appointment date	NHS Number	Forename	Surname	Consultant	Source of Referral	Date of Referral	Date referral received
131313	28/04/2007	313131	Brian	Bell	Z1230020	A&E	28/08/2008	17/04/2007
141414	31/05/2003	414141	Charles	Cooper		A&E	11/05/2003	12/05/2003
151515	23/06/2007	515151	Darren	Davis	Z1230007	A&E	28/08/2008	12/06/2007
161616	01/04/2007	616161	Edith	Evans	Z1230010	A&E	03/03/2007	07/03/2007
161616	10/01/2002	616161	Edith	Evans		A&E	12/12/2001	15/12/2001

➢ Go back to Design Management one more time and set the **Date of Diagnosis** condition to be **Cell Only** rather than Entire Row.

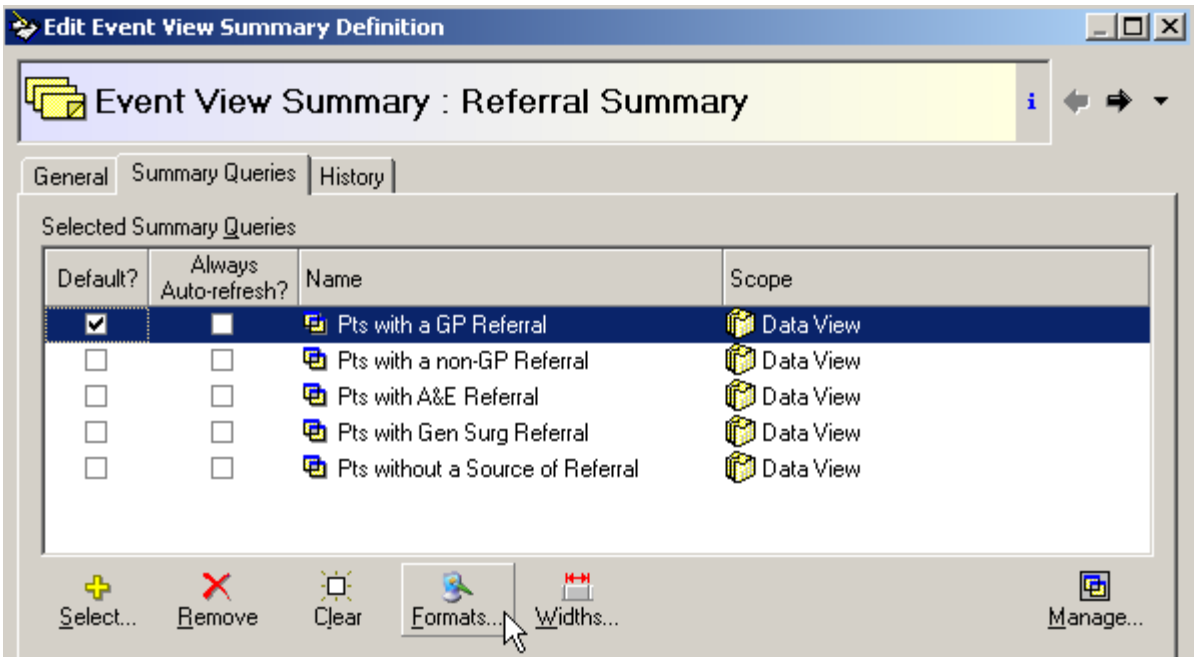


➢ You should now find that in the Work List module, the three rows are highlighted in orange, but where the Date of Diagnosis is blank, the cell is displayed in red.

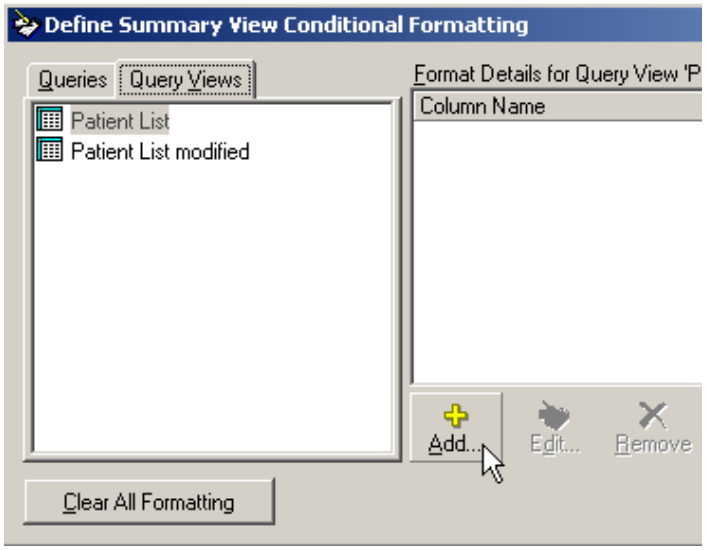
Date of Referral	Date referral received	Days from referra	Date of Diagnosis	Bas
28/08/2008	17/04/2007	-488		
11/05/2003	12/05/2003	020	15/07/2003	
28/08/2008	12/06/2007	013		
03/03/2007	07/03/2007	029	15/05/2007	
12/12/2001	15/12/2001	029	22/02/2002	

6.3.1 Conditional formatting on query views

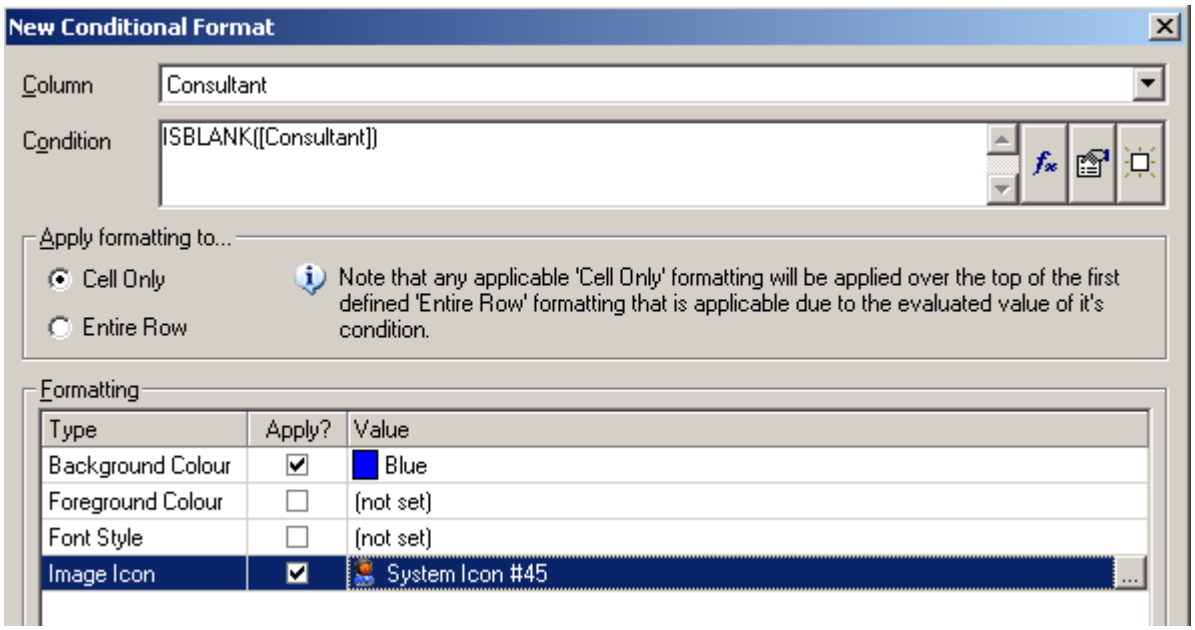
➢ In Design Management, display the **Training** data view, open the **Referral Summary** summary view definition and go to the **Summary Queries** tab. Press the **Formats** button.



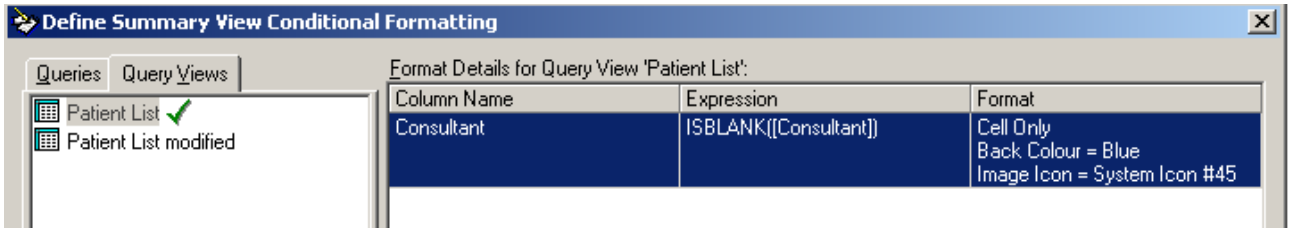
➢ Go to the **Query Views** tab, highlight the **Patient List** query view and press the **Add** button. When you define formatting for a query view, the formatting will be applied for all queries that use that query view, as long as those queries have no formatting defined.



➢ Define a conditional format for the **Consultant** column such that where **Consultant** is blank, the cell only will have a blue background and an image icon.

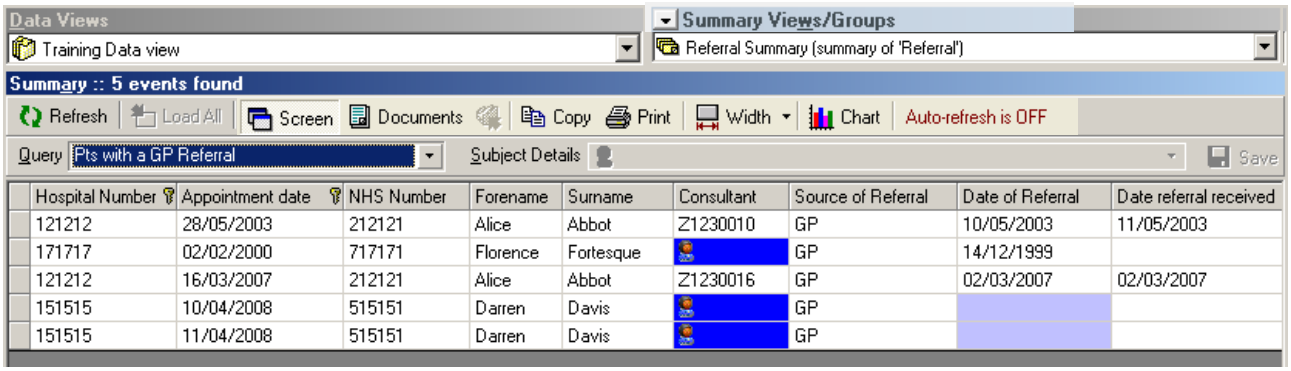


➢ Ensure that the format is displayed on the **Query Views** tab.



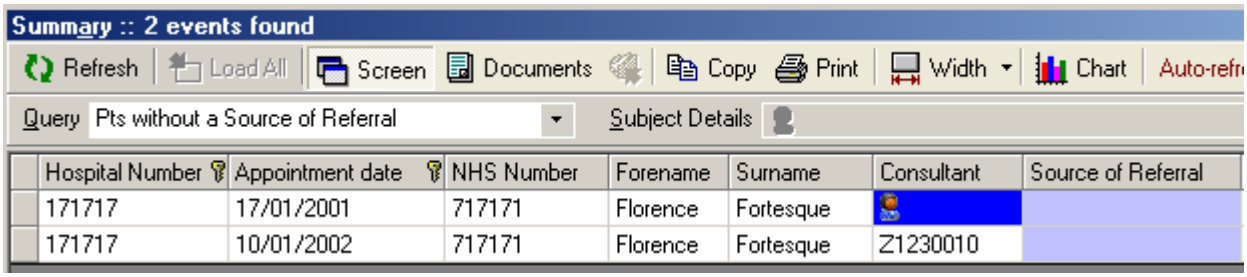
➢ In the Work List module, look at the **Pts with a GP Referral** query.

Where the Consultant is blank, there is a blue background and an icon.

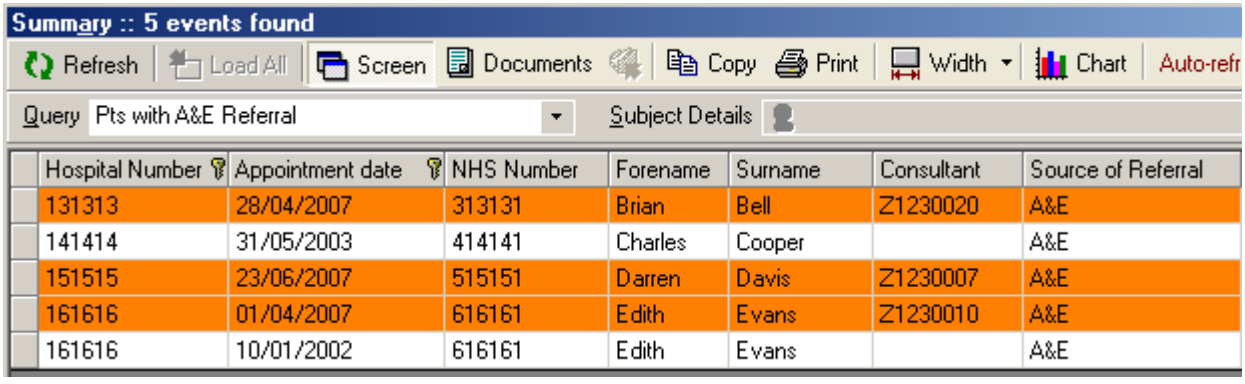


➢ Choose the **Pts without a Source of Referral** query.

In this query too, where the Consultant is blank, there is a blue background an icon. This is because the query uses the same query vie w, and there is no other formatting defined on the query.



➢ Now check the **Pts with A&E referral** query. Even though it uses the same query view, there is no formatting where Consultant is blank, because the query has its own formatting defined.



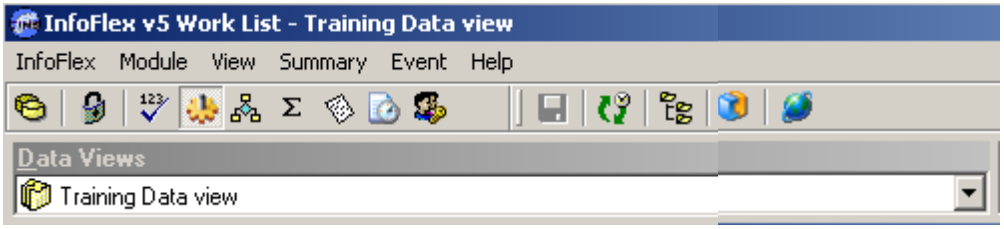
7 MENUS AND TOOLBARS

The toolbar and menu commands in the Work List module can be accessed in a variety of places.

7.1 Toolbars

7.1.1 Work List toolbar

The buttons listed below are available on the **Work List** toolbar.



Save Saves changes made in the grid or data entry screen. Only enabled if changes have been made to the data. Also available on the Summary grid toolbar and the Event menu.

Auto-refresh Switches the Auto-refresh function on and off. See above section 4.7.2. Also available on the Summary menu.

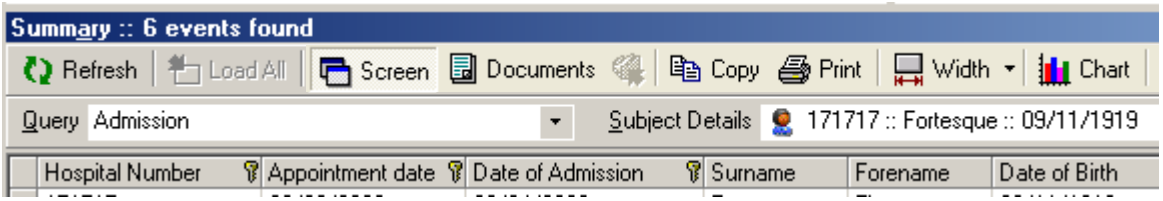
Edit Selected Subject In Data Entry Opens a new window to allow the selected subject to be edited in Data Entry. See above 4.8.5. Also available on the Event menu.

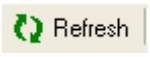
Pathway Viewer Displays the pathway viewer dialog (where available) for the current subject group. (See separate document on the pathway viewer for more details.) Also available on the View menu.

Open Web Page Displays the optional web page associated with the currently selected summary view. If the summary view has no web page specified then this menu item will open the web page associated with the currently selected summary grid event. If no web page is associated with either then this menu item is disabled. Also available on the View menu.

7.1.2 Summary toolbar

The buttons listed below are available on the **Summary** toolbar.

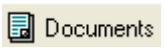




Refreshes the data displayed in the grid to display the latest data and event views that meet the query criteria. This is particularly relevant when more than one person is working in the database and data may have been changed or updated. Also available on the Summary menu and the summary grid right click menu.

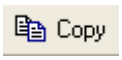
Enabled while data is being loaded into the summary grid in the background. Disabled when all of the data has been loaded into the grid. If the button, or menu item, is clicked while it is enabled then the remaining results will be loaded into the summary grid there and then. A progress dialog is displayed so that load can be cancelled. Cancelling will cause the background load to resume and continue until all of the summary grid data has been loaded.

Shows and hides the data entry screen. Also available on the View menu. Note that summary views set to **Grid only** do not allow the data entry screen to be displayed.



Shows and hides the Documents panel. Also available on the View menu.

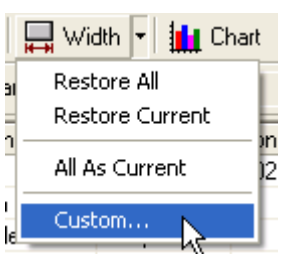
Return to selected summarised event. Press to return to the data entry screen if a document is being displayed but the Documents panel is not displayed.



Copies the contents of the summary grid to the clipboard in tab delimited format with item values encased in double quotes. Also available on the Summary menu and the summary grid right click menu.

Prints the contents of the **Summary grid**. Also available on the Summary menu and the summary grid right click menu.

Changes the column widths in the grid. (Also available on the Summary menu and the summary grid right click menu).



The following options are available:

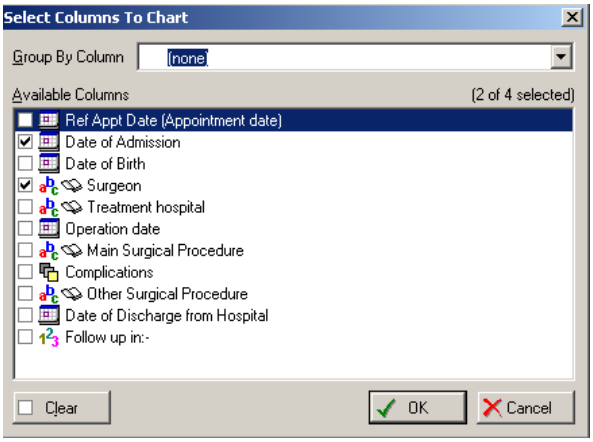
Restore all Sets all columns to their default width

Restore Current Sets the selected column to its default width

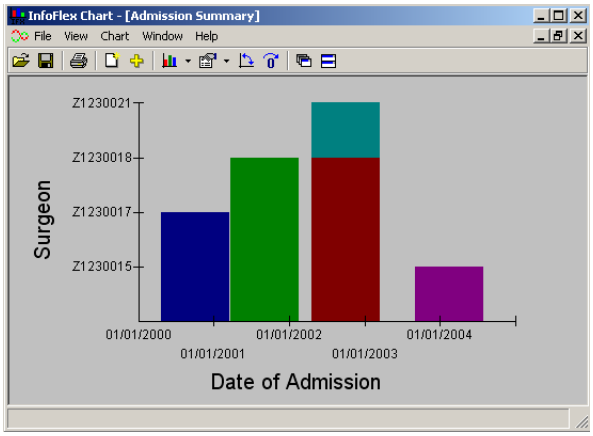
All As Current Sets all columns to the width of the currently selected column

Custom Allows you to set the columns widths to whatever you choose

Displays the InfoFlex **Charting** application. (Also available on the Summary menu and the summary grid right click menu). Selecting this option displays a **Select Columns** dialog that allows the user to select up to four columns to chart. Note that only certain columns will be available depending on the item type.

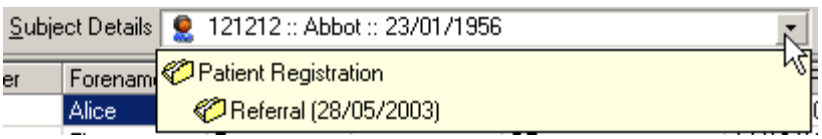


Closing this dialog via the **OK** button displays the requested chart.



Lists the queries associated with the summary view. Queries can also be selected from the Summary menu and the summary grid right click menu.

Displays the domain identifiers for the selected subject. The **Subject Details** dropdown displays the event view hierarchy for the summarised event view.

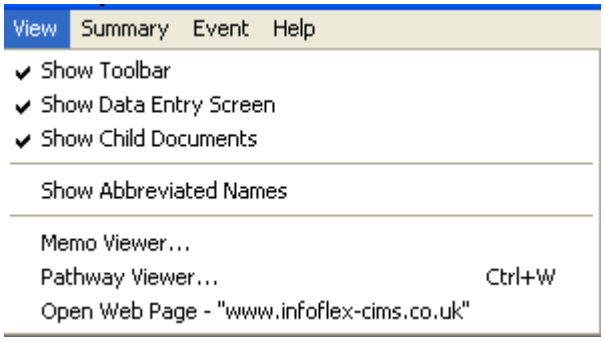


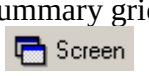
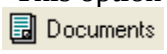
Saves changes made to the currently selected summary grid event. Also available on the Work List toolbar and the Event menu.

7.2 Menus

The Work List module has dropdown menus at the top of the screen and a right click menu on the summary grid. The commands available on the menus are detailed below.

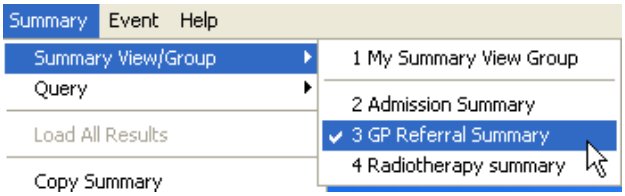
7.2.1 View menu



Show Toolbar	Shows/hides the summary grid toolbar. This option is also available from the summary grid right click menu.
Show Data Entry Screen	Shows and hides the data entry screen. Note that summary views set to **Grid only** do not allow the data entry screen to be displayed. This option is also available from the summary grid right click menu and in the summary grid toolbar. 
Show Child Documents	Shows and hides the Documents panel. This option is also available in the summary grid toolbar. 
Show Abbreviated Names	If checked then the header columns in the summary grid display abbreviated item names where available. If unchecked then the header columns display full item names. This option is also available from the summary grid right click menu.
Memo Viewer	Displays the memo viewer for the currently selected summary grid event view. This is identical to the memo viewer in Data Entry and allows the contents of memo items in the currently selected event to be read more easily.
Pathway Viewer	Displays the pathway viewer dialog (where available) for the current subject group. This option is also available on the main toolbar. (See separate document on the pathway viewer for more details.)
Open Web Page	Displays the optional web page associated with the currently selected summary view. If the summary view has no web page specified then this menu item will open the web page associated with the currently selected summary grid event. If no web page is associated with either then this menu item is disabled. This option is also available on the main toolbar.

7.2.2 Summary menu

Summary View /Group — Displays a submenu listing all of the summary groups and views available for the currently selected data view. The summary views are numbered to ease selection via the keyboard. (Select **Summary**, **Summary View/Group** then the number of the summary view required, e.g. **1**, **2**, etc)



Selecting a summary view refreshes the summary grid and query list. Summary views can also be selected from the Summary View drop down list.

Query — Displays a submenu listing all the query definitions defined for the currently selected summary view. The submenu entries are all numbered to ease selection via the keyboard. Selecting a query refreshes the grid. Queries can also be selected from the Query drop down list in the summary grid toolbar and from the summary grid right click menu.

Load All Results — As for Load All button. See 7.1.2

Copy Summary — Copies the contents of the grid, row, column or cell to the clipboard in tab delimited format with item values encased in double quotes. This option is also available from the summary grid right click menu.

Print Summary — Prints the current contents of the summary grid. This option is also available from the summary grid right click menu and on the summary grid toolbar.

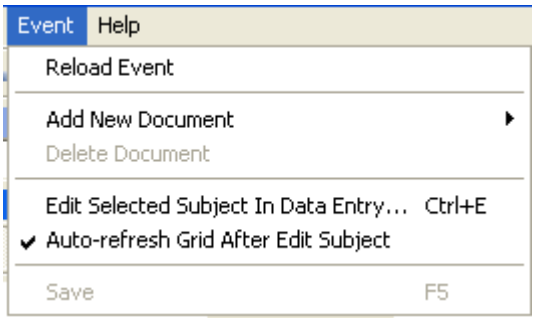
Column Widths — Changes the column widths in the grid. See above 7.1.2. This option is also available from the summary grid right click menu and on the summary grid toolbar.

Chart — Displays the InfoFlex **Charting** application. See above 7.1.2. This option is also available from the summary grid right click menu and the Summary menu.

Auto-refresh — Switches the Auto-refresh function on and off. See above section 4.7.2. This option is also available on the Summary menu and the Work List toolbar.

Refresh — Refreshes the summary grid for the current query. See above section 4.7.1. This option is also available from the summary grid right click menu and the summary grid toolbar.

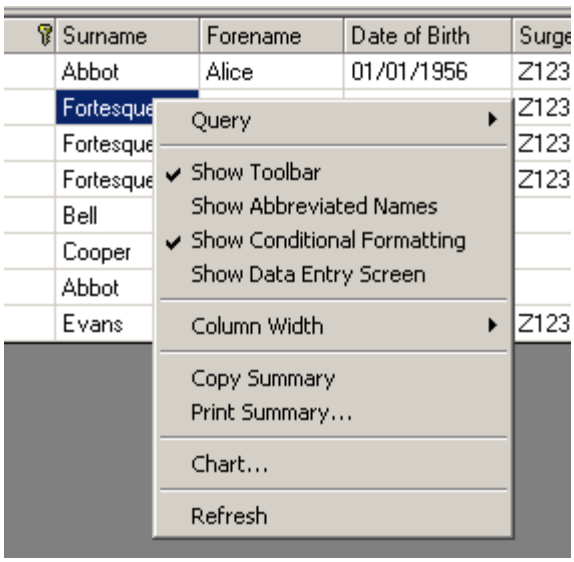
7.2.3 Event menu



Reload Event	This causes the values that are currently saved in the database to be reloaded into the grid and data entry screens for the selected event. This option can be used to reset any changes/edits made to the event in the summary grid or in the data entry screen that have not yet been saved. If there are changes to be saved then the user should be prompted as to whether or not to reload the event.
Add New Document	When documents are available, generates a document for the currently selected subject event.
Delete Document	When a document is displayed, deletes that document (subject to user permissions)
Edit Selected Subject In Data Entry	Opens a new window to allow the selected subject to be edited in Data Entry. See above 4.8.5. This option is also available on the Work List toolbar.
Auto-refresh Grid After Edit Subject	Causes the grid to refresh after editing a subject in Data Entry. When switched on, refreshes the data and adds any new event views for the subject to the grid. This setting is switched **off** by default.
Save	Saves changes made in the grid or data entry screen. Only enabled if changes have been made to the data. This option is also available from the summary grid right click menu and the **Save** button on the Summary grid toolbar.

7.2.4 Right click menu

Query	See the Summary menu
Show Toolbar	See the View menu
Show Abbreviated Names	See the View menu
Show Conditional Formatting	See the View menu
Show Data Entry Screen	See the View menu
Column Width	See the Summary menu
Copy Summary	See the Summary menu
Print Summary	See the Summary menu
Chart	See the Summary menu
Refresh	See the Summary menu



8 SUMMARY VIEWS IN THE DATA ENTRY MODULE

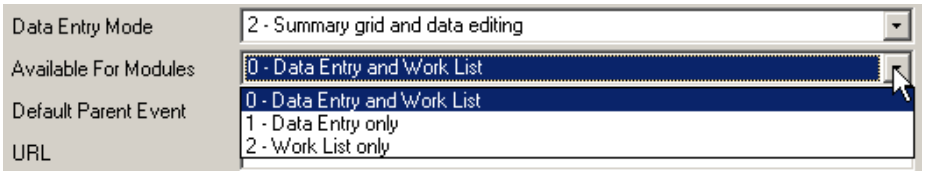
Summary views can be viewed in the Data Entry module as well as in the Work List module, however the information displayed relates to single patients only.

Each summary view can be made available to the Data Entry module only, the Work List module only or to both modules, so your list of summary views may differ from that available in the Work List module.

Some Summary Views may not be appropriate for single subjects. Summary views for use in the Data Entry module should be for events that are likely to be repeated several times for one subject (eg Pathology Test results). The query view does not need items relating to demographic details because the subject identifiers are already known.

➢ In Design Management, edit the Event View Summary definition for the **My Admissions Summary** event view summary.

➢ Set the **Available For Modules** to **0 – Data Entry and Work List**.


Data Entry Mode
2 - Summary grid and data editing
Available For Modules
0 - Data Entry and Work List
Default Parent Event
URL
0 - Data Entry and Work List
1 - Data Entry only
2 - Work List only

8.1 Displaying a summary view in the Data Entry module

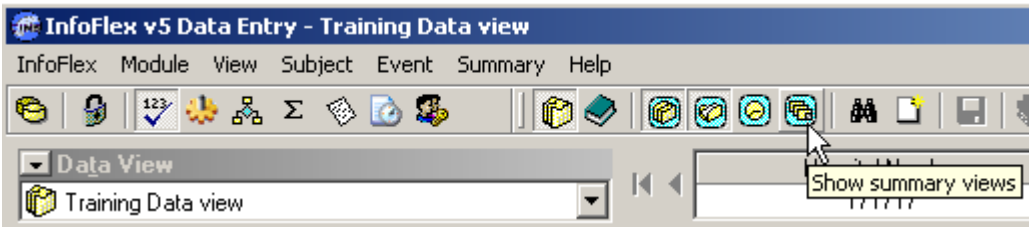
To display a summary view, you must first select a subject in the Data Entry module.

➢ Go to the Data Entry module and choose the Training data view.

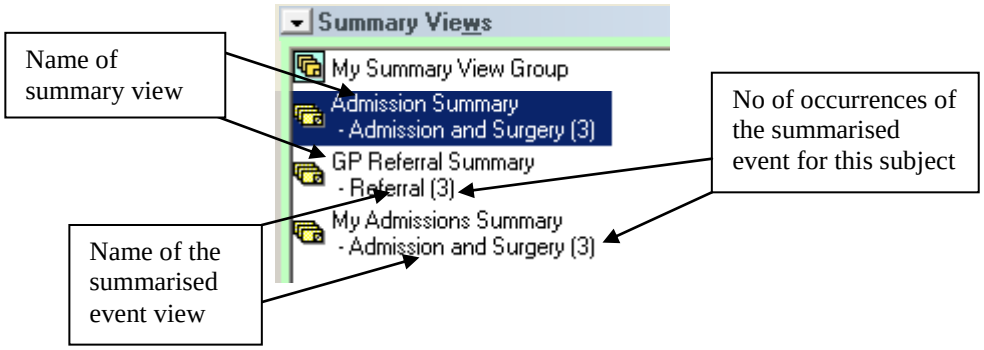
➢ Find patient 171717.

Once a subject is selected, the available summary views and groups are displayed in the **Summary Views** box below the **Subject Overview**.

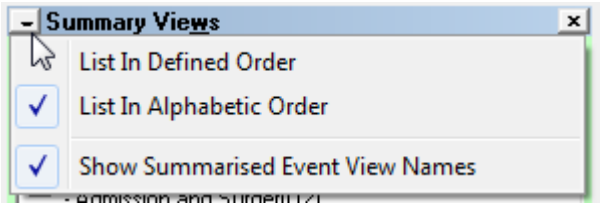
If the **Summary Views** box is not displayed, switch it on by pressing the **Show summary views** button on the toolbar.


InfoFlex v5 Data Entry - Training Data view
InfoFlex Module View Subject Event Summary Help
Data View
Training Data view
Show summary views

The **Summary Views** box shows all the available summary groups and views. For summary views, the name of the summary view is followed by the name of its summarised event view. The number of occurrences of an event view is indicated in brackets.


Summary Views
My Summary View Group
Admission Summary
- Admission and Surgery (3)
GP Referral Summary
- Referral (3)
My Admissions Summary
- Admission and Surgery (3)
Name of summary view
Name of the summarised event view
No of occurrences of the summarised event for this subject

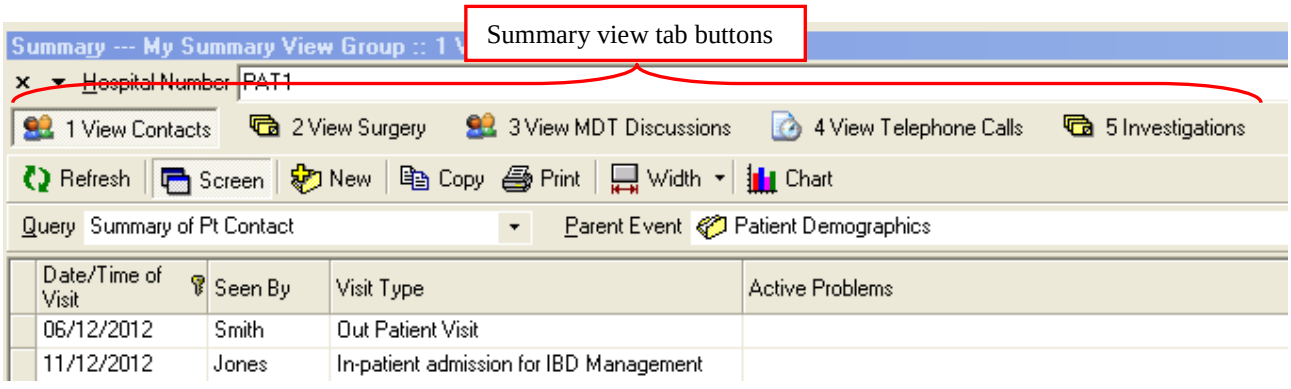
In the **Summary Views** list, the order in which the available summary views are listed is configurable. Press the dropdown arrow to display two options: **List in Defined Order** and **List in Alphabetic Order**.



The **Show Summarised Event View Names** option controls whether to display the name of the summarised event view alongside the name of the summary view in the Summary Views/Groups list. The default is to display the summarised event view name

Note about "Defined order"
Defined order for Summary Views is the order in which they appear in the tree in Design management. You can manually re-order the Summary Views in Design Management.
Defined order for Summary View Groups is currently the order in which they were created. This will be amended in a future release.

If you select a group, a Summary View selector (row of tab buttons) is displayed between the Subject List or Quick Find and the Work List toolbar. There is a tab button for each summary view in the selected Summary Group. By default, the first Summary View in the group will be displayed. Pressing a tab button will display the Summary View named on the button.



The usual data entry part of the screen is divided into the grid displaying the query results and the data entry screen. Note that the **Screen** button shows and hides the data entry screen as in the Work List module.

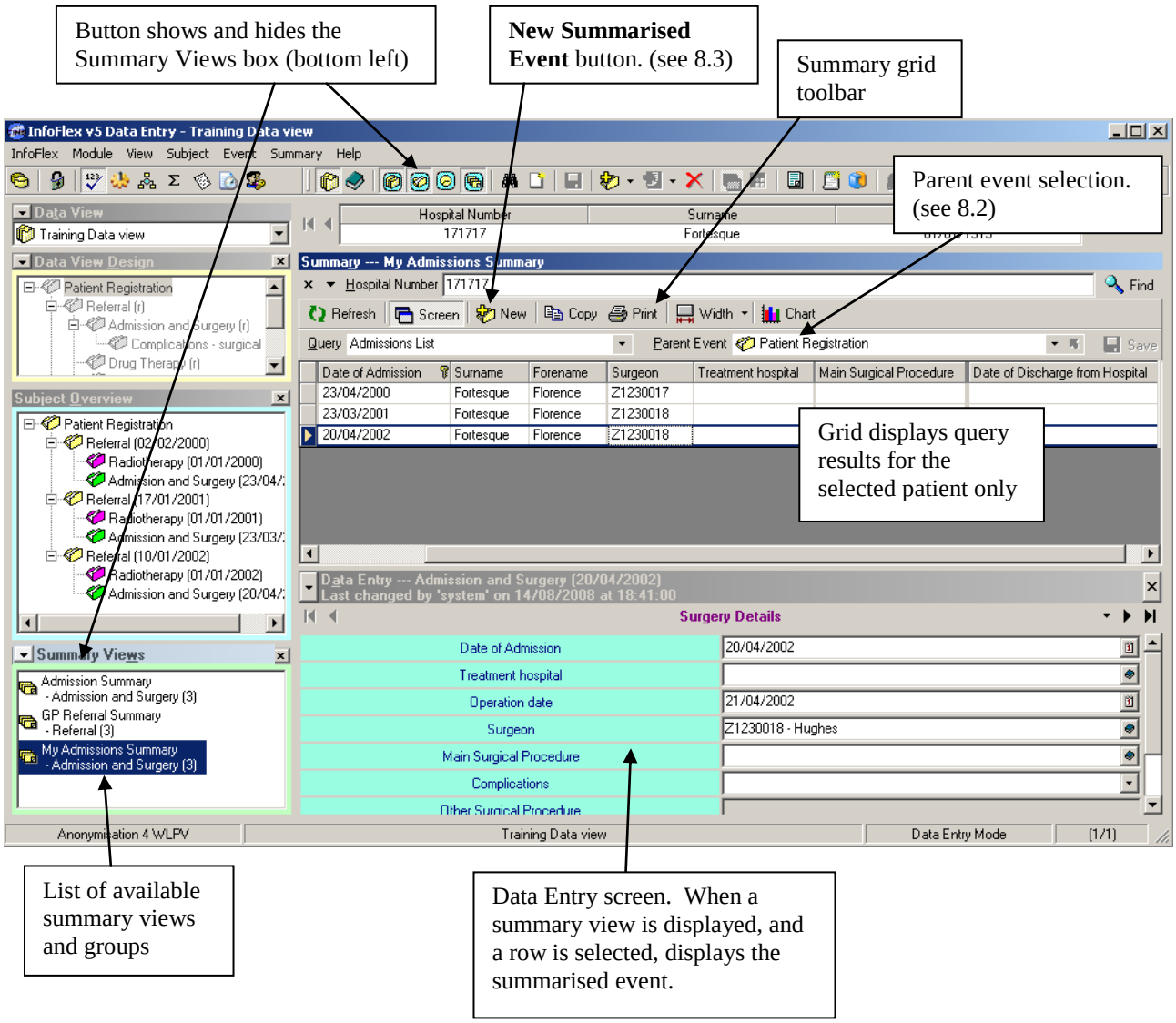
The grid displays information relating to the selected patient only. They query is still used to control the data items and the particular occurrences displayed.

If you wish to view information relating to a different patient, you should carry out a search in the usual way, then re-select the summary view.

See the next page for the layout of the Work List in the Data Entry module.

The functions available in the Data Entry module are similar to the Work List module, with some changes:

Auto-refresh	not available in Data Entry
Parent event	an extra feature in Data Entry only (see below 8.2)
Add new event	an extra feature in Data Entry only (see below 8.3)
Work List toolbar	not relevant as commands available elsewhere
View menu options	available on Summary and Event menus in Data Entry

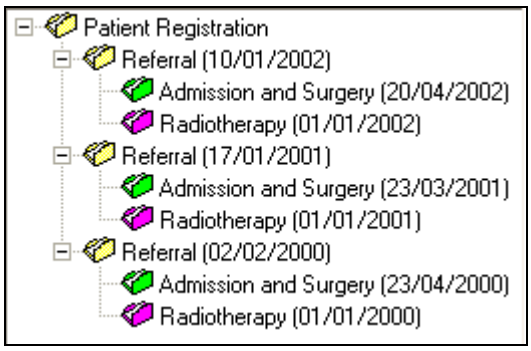

Button shows and hides the Summary Views box (bottom left)
New Summarised Event button. (see 8.3)
Summary grid toolbar
Parent event selection. (see 8.2)
Grid displays query results for the selected patient only
List of available summary views and groups
Data Entry screen. When a summary view is displayed, and a row is selected, displays the summarised event.
InfoFlex v5 Data Entry - Training Data view
Summary --- My Admissions Summary
Data Entry --- Admission and Surgery (20/04/2002)
Surgery Details

8.2 Parent Event

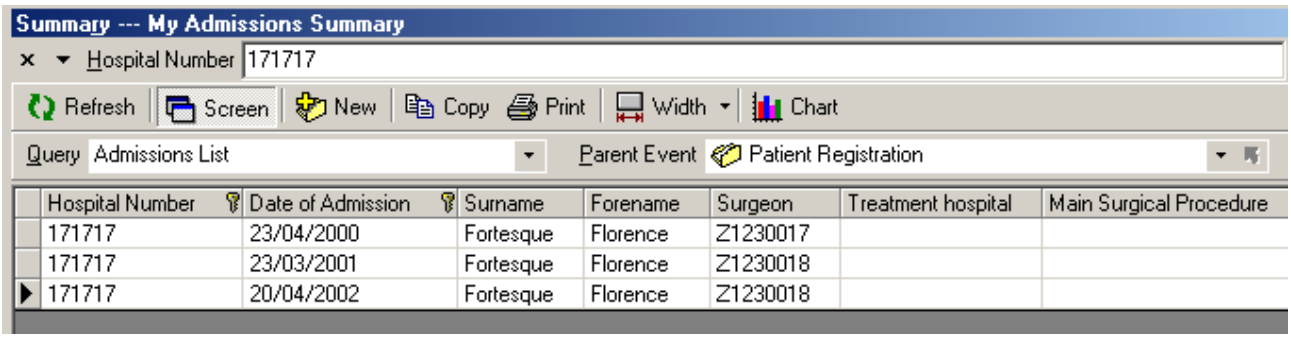
This option is only available when the summarised event has a repeat parent or repeat ancestor event. It allows you to restrict the events shown in the **Summary grid** to only those that are descended from the selected parent event.

eg select patient **Florence Fortesque, 171717** and the **Admission Summary** summary view.

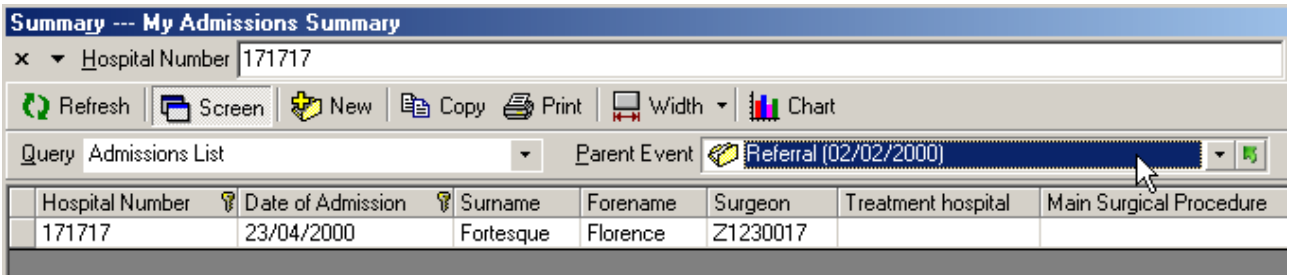
There are three referrals each with an Admission & Surgery event:



If the **Parent Event** is the **Patient Registration** event, then you will see all three of the Referrals and Admission & Surgery events in the **Summary grid:**


Summary --- My Admissions Summary
Hospital Number 171717
Refresh Screen New Copy Print Width Chart
Query Admissions List
Parent Event Patient Registration
Hospital Number | Date of Admission | Surname | Forename | Surgeon | Treatment hospital | Main Surgical Procedure
171717 | 23/04/2000 | Fortesque | Florence | Z1230017
171717 | 23/03/2001 | Fortesque | Florence | Z1230018
171717 | 20/04/2002 | Fortesque | Florence | Z1230018

However, if you select one of the **Referral** events in the **Parent Event** you will only see the associated Admission & Surgery event in the **Summary grid**.


Summary --- My Admissions Summary
Hospital Number 171717
Refresh Screen New Copy Print Width Chart
Query Admissions List
Parent Event Referral (02/02/2000)
Hospital Number | Date of Admission | Surname | Forename | Surgeon | Treatment hospital | Main Surgical Procedure
171717 | 23/04/2000 | Fortesque | Florence | Z1230017

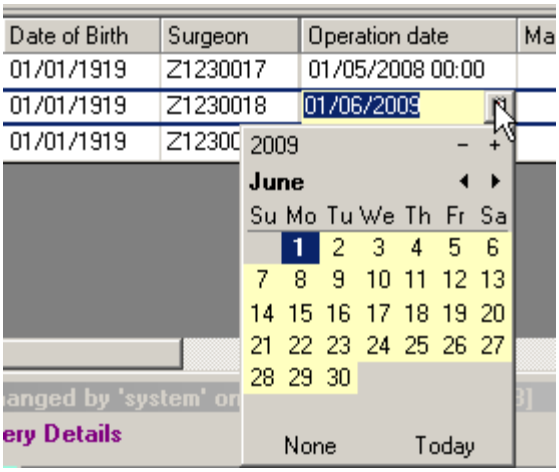
8.3 Editing Data

If a user has permission to edit data, then data items belonging to the summarised event view can be edited either in the grid or in the data entry screen.

Note that it is only possible to edit data items that belong to the summarised event view. Other data items in the summary view (eg demographic items) can not be edited.

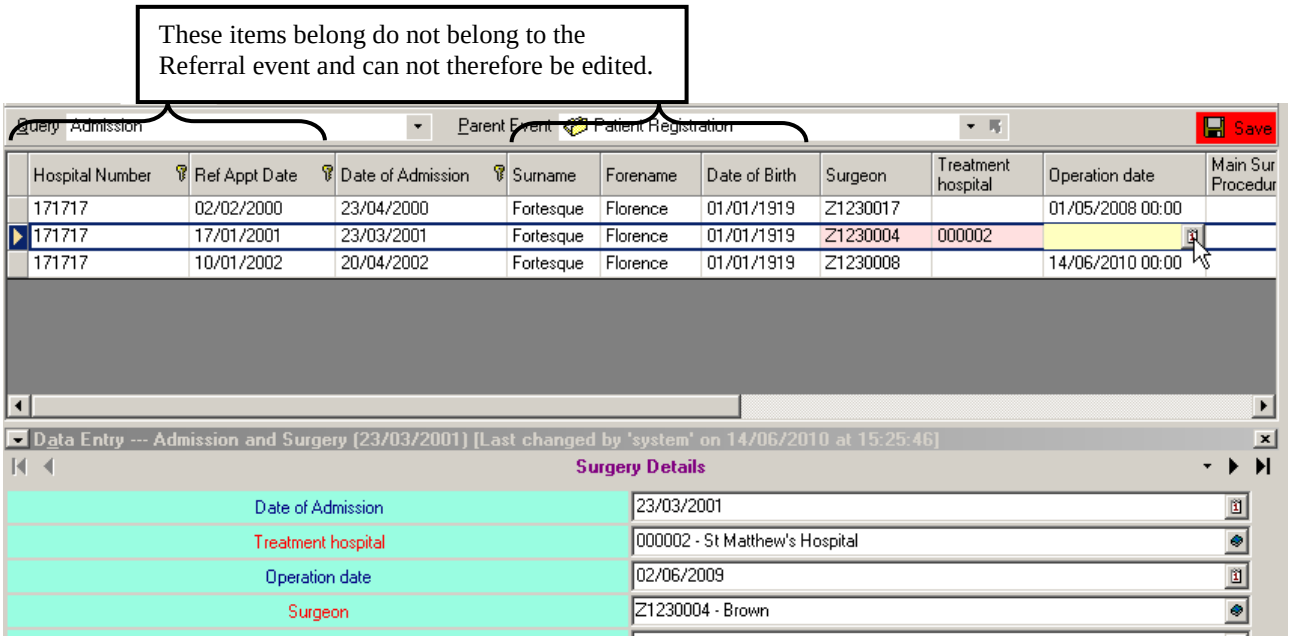
8.3.1 Editing data in the grid

To edit data in the grid, simply click in a cell.
If you have permission to edit, the cell will display the usual data entry controls.



As you move between cells, any cell you have edited turns pink in the grid and the item name is shown in red in the data entry screen. The **Save** button is enabled to indicate that changes have been made.

If you move to edit a cell in a different row without having saved, you will be prompted to save because you are moving to a different event. However if you move from one cell to another in the same row, you will not be prompted to save because all the items are in the same event.

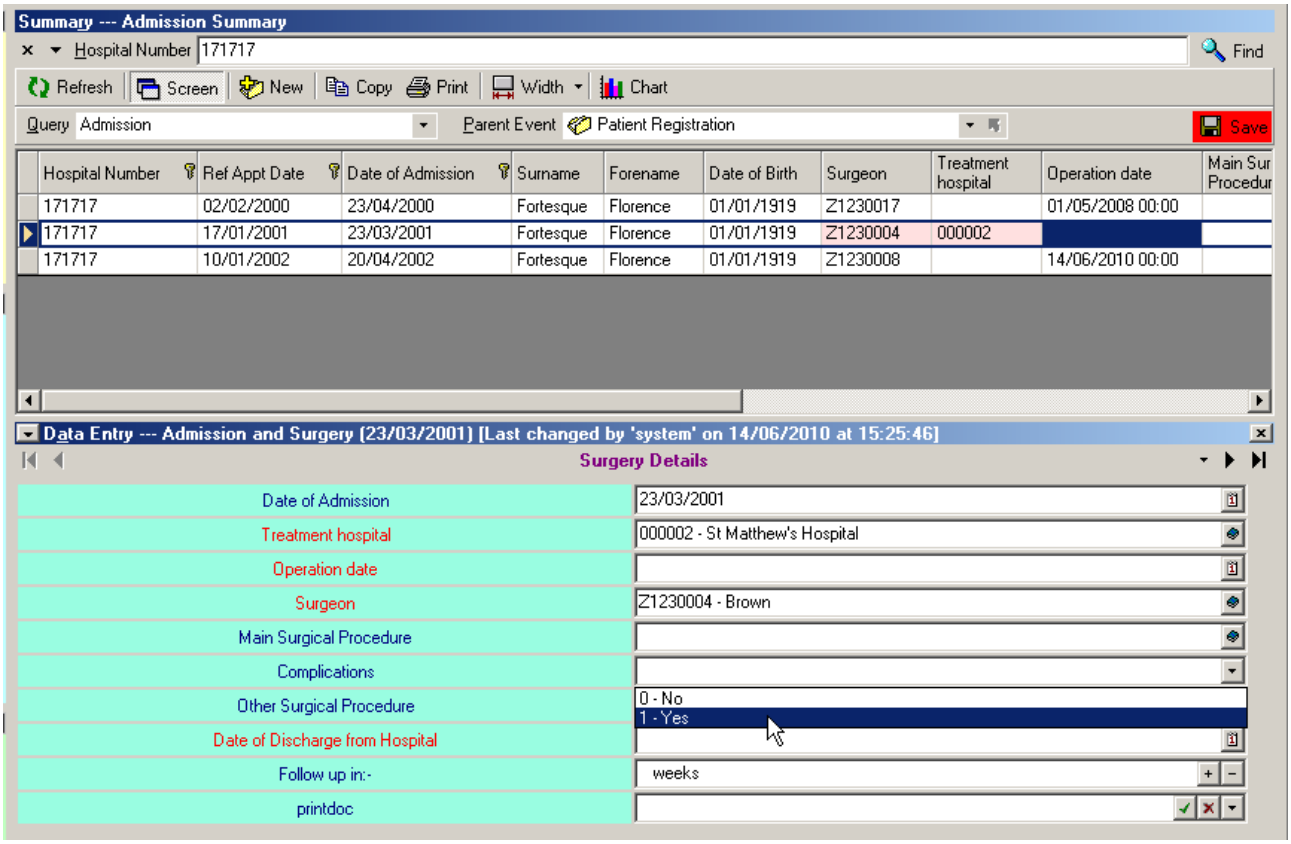


When you have finished editing, press the **Save** button, and the data entry screen will be updated with the edited data.

8.3.2 Editing data in the data entry screen

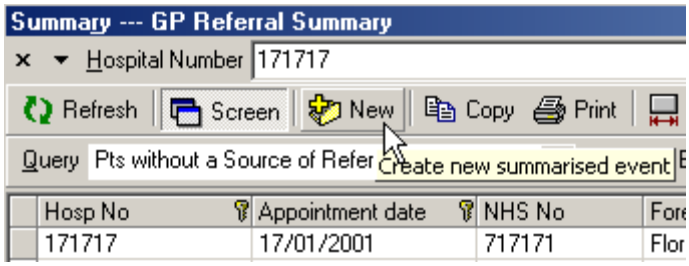
To edit data in the data entry screen, first highlight a row in the grid. This causes the data entry screen to display the whole summarised event view for the selected row.

Edit data in the same way as you would in the Data Entry module. Navigate through the panels as appropriate and press the **Save** button when you have finished editing.

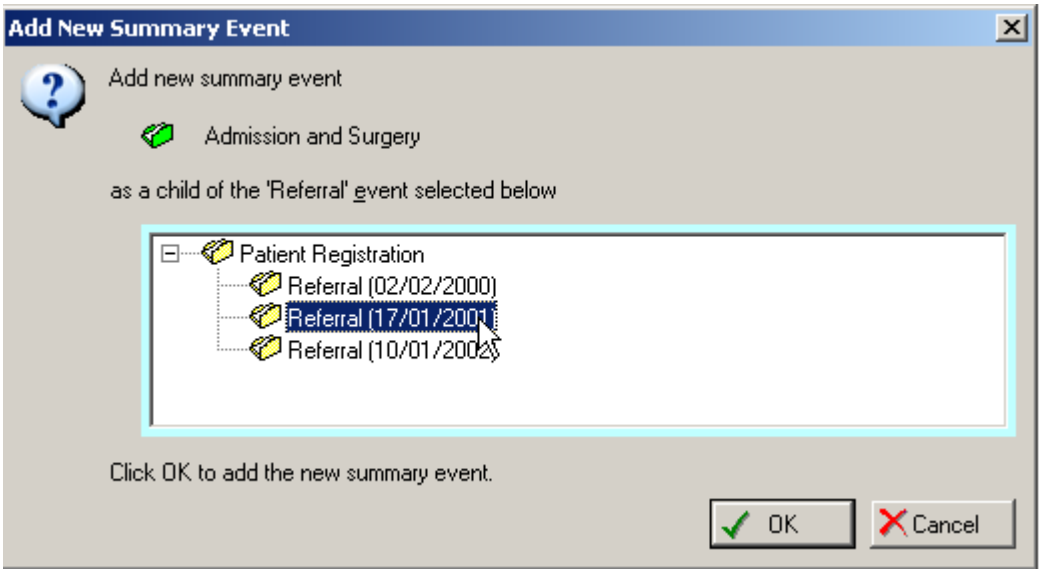


8.4 Adding a new event

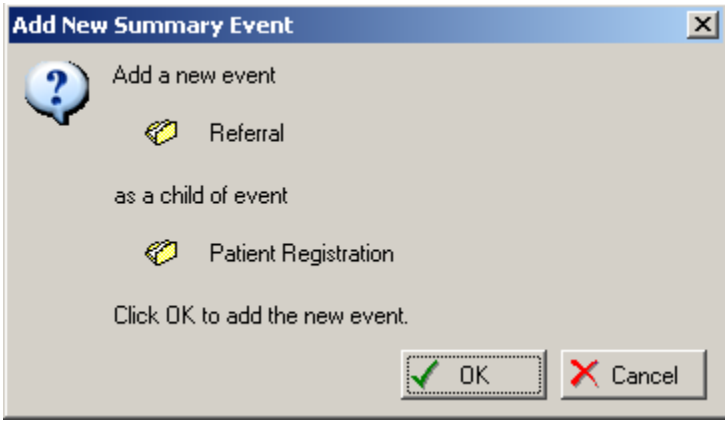
You can use the **New** button on the Summary grid toolbar to add a new instance of the summarised event.



On pressing the **New** button, the **Add New Event** window is displayed. If there are several possible parents for the event, you should choose which parent to add the new event to.



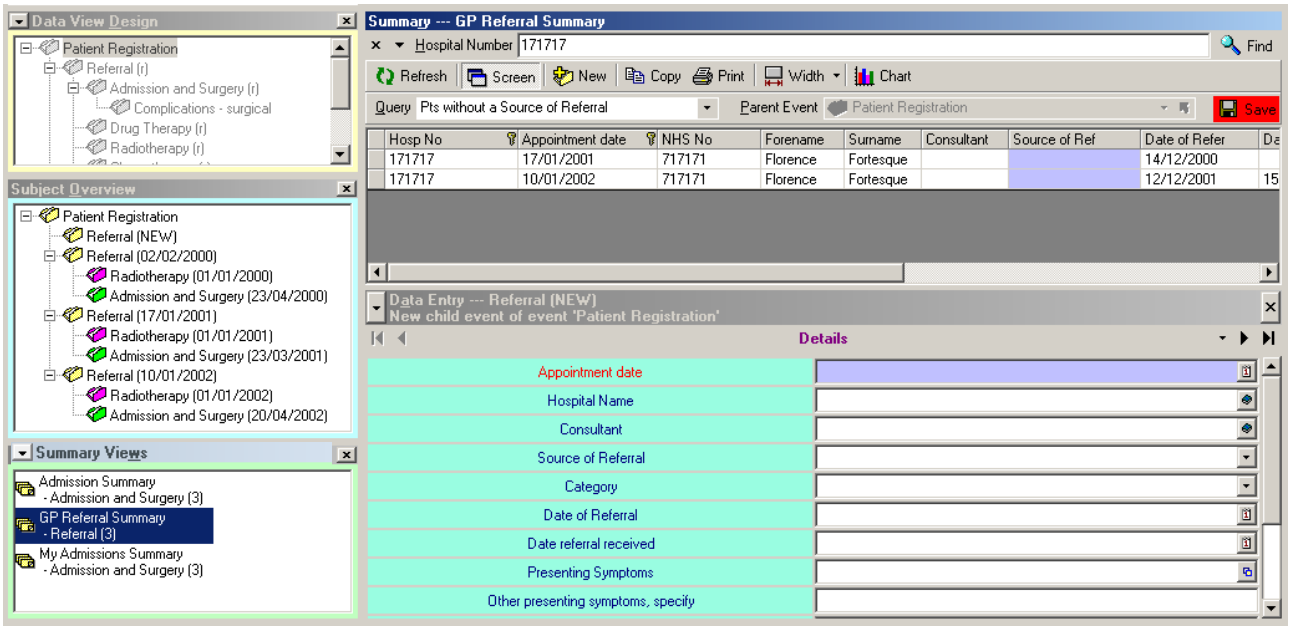
If there is only one possible parent, simply click **Yes** to the confirmation message.



The data entry section of the screen displays the new event, and the event is also displayed in the Subject Overview tree.

Enter data and save the event as usual.

On saving, the event will be displayed in the Subject Overview as usual and it will be displayed in the grid if it meets the query criteria.



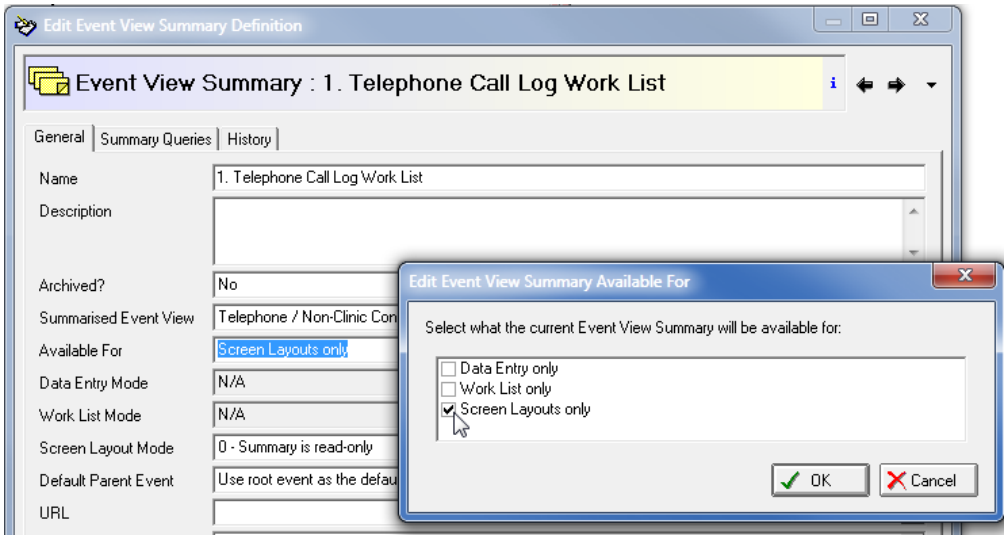
9 SUMMARY VIEWS IN PANEL LAYOUTS

It is possible to add summary views to panel layouts in the same way that notes, frames and buttons are added to panel layouts. This means that repeat data from any repeating events for a single patient can be viewed in any event regardless of the event relationships. One or more queries can be defined within the event view summary. Multiple event view summaries can be placed on the same panel. Summary views can be used on panels that are viewed in the Work List module.

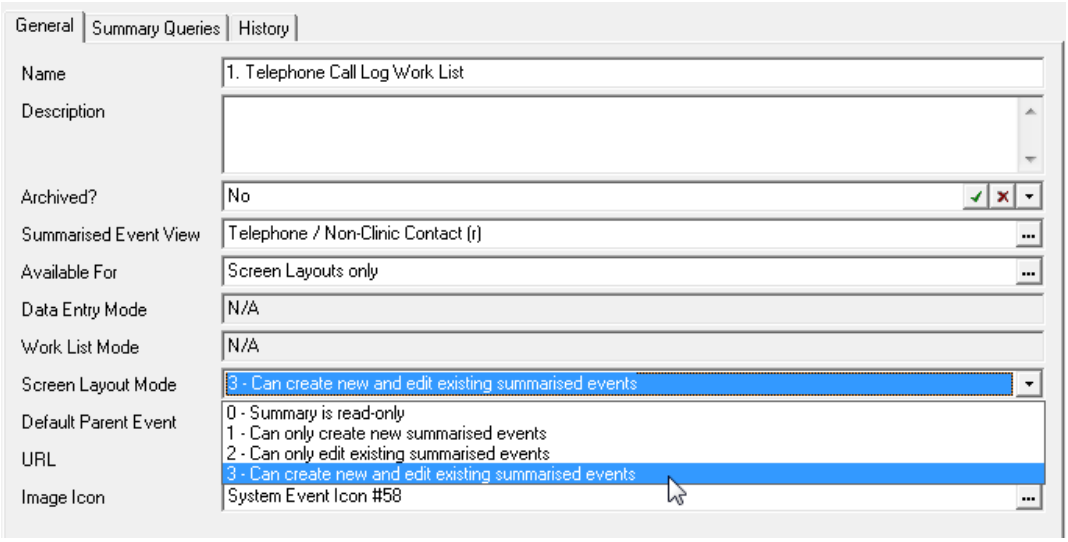
The event view summary can be configured to allow viewing of the summary only, viewing or editing the whole instance of a summarised event or adding new instances of the summarised event. The event view summary can also be configured to restrict the instances shown to only those in the current branch of the subject overview. Event view summaries can have availability conditions applied.

9.1 Design Management

To add an event view summary to a panel layout, first define an event view summary in the usual way in Design Management. On the **General** tab in the **Available for** property, tick the **Screen Layouts** option (and Data Entry or Work list if required).



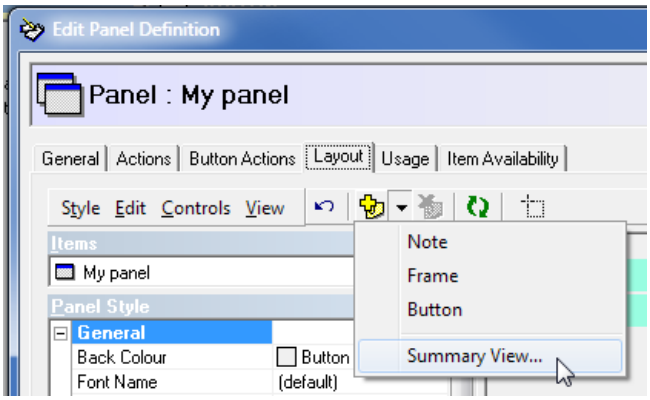
The **Screen Layout Mode** property controls whether the event view summary is read only, editable or allows creation of new events.



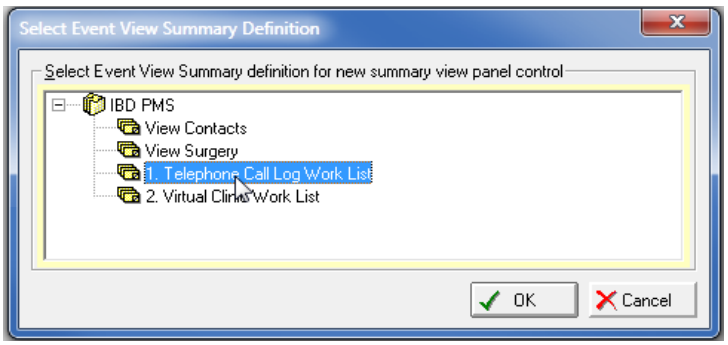
Add one or more queries to the Event View Summary and set all the remaining properties in the usual way.

Now go to the panel you wish the Event View Summary to be visible in and edit the panel layout for that panel.

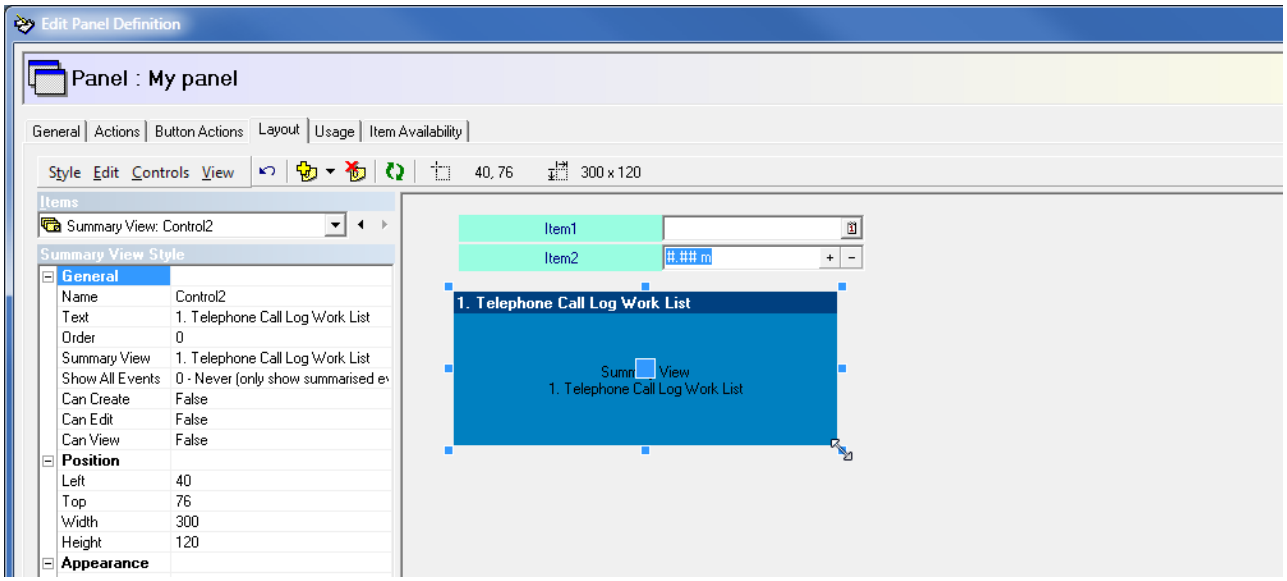
Press the **Add New Control** toolbar button and choose the new **Summary View** option.



The dialog displays any Event View Summaries in the current data view that are defined to be available for Screen Layouts. Select an Event View Summary and press **OK**.



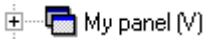
You can move and resize the event view summary just like any other item, button, note or frame.



The following properties can be set for the event view summary:

Property	Description
Name	(for reference only)
Text	Text for the titlebar of the Event View Summary. Initially set to the name of the event view summary definition. Clearing the contents of this property will hide the titlebar. If a different summary view is selected this text is not automatically updated.
Order	Order of the summary view control in relation to the other panel controls.
Summary View	The event view summary being displayed. Can be changed from the one that was initially selected. Note that changing the event view summary will not update the Text property.
Show All Events	Controls which instances of the summarised event will be displayed **0 – Never (only show summarised events in current context)** Only shows the events in the same branch of the subject overview as the current event. **1 – Always (show all summarised events for subject)** Always shows all instances of the summarised event. **2 - Optional** User can choose whether to show all the summarised events or to limit to the current branch. The **Show All** button is available on the toolbar and the **Show All Events** option is available on the right click menu. By default, the initial state will be to limit the events to the current branch (ie not to show all).
Can Create	Controls whether new instances of the summarised event can be created. Can only be set to True if the selected summary view definition itself allows creation of new summarised events.
Can Edit	Controls whether existing instances of the summarised event can be edited. Can only be set to True if the selected summary view definition permits editing of existing summarised events.
Can View	Controls whether existing instances of the summarised event can be viewed in full in a pop up window. Only relevant if **Can Edit** is set to **False**.
Left, Top, Width, Height	Position and dimensions of the summary view control.
Border Style	Border style for the event view summary view (can be 0 – Standard (none), 1 – Flat, 2 – 3D).
Font Name/Size/Style	Name, size and style of the font used in the title and grid of the event view summary.
Show Toolbar	Specifies whether or not to display the event view summary toolbar. A right-click menu is available irrespective of the value of this property.

After saving the panel layout, the panel shows (V) after the panel name. This indicates that the panel contains one or more event view summaries.



9.2 Data Entry

In Data Entry, the event view summary is displayed according to the properties set in both the event view summary definition (eg default query and availability of the **None** query option) and the panel layout.

If the default query is a prompt query, the user is prompted on entering the panel.

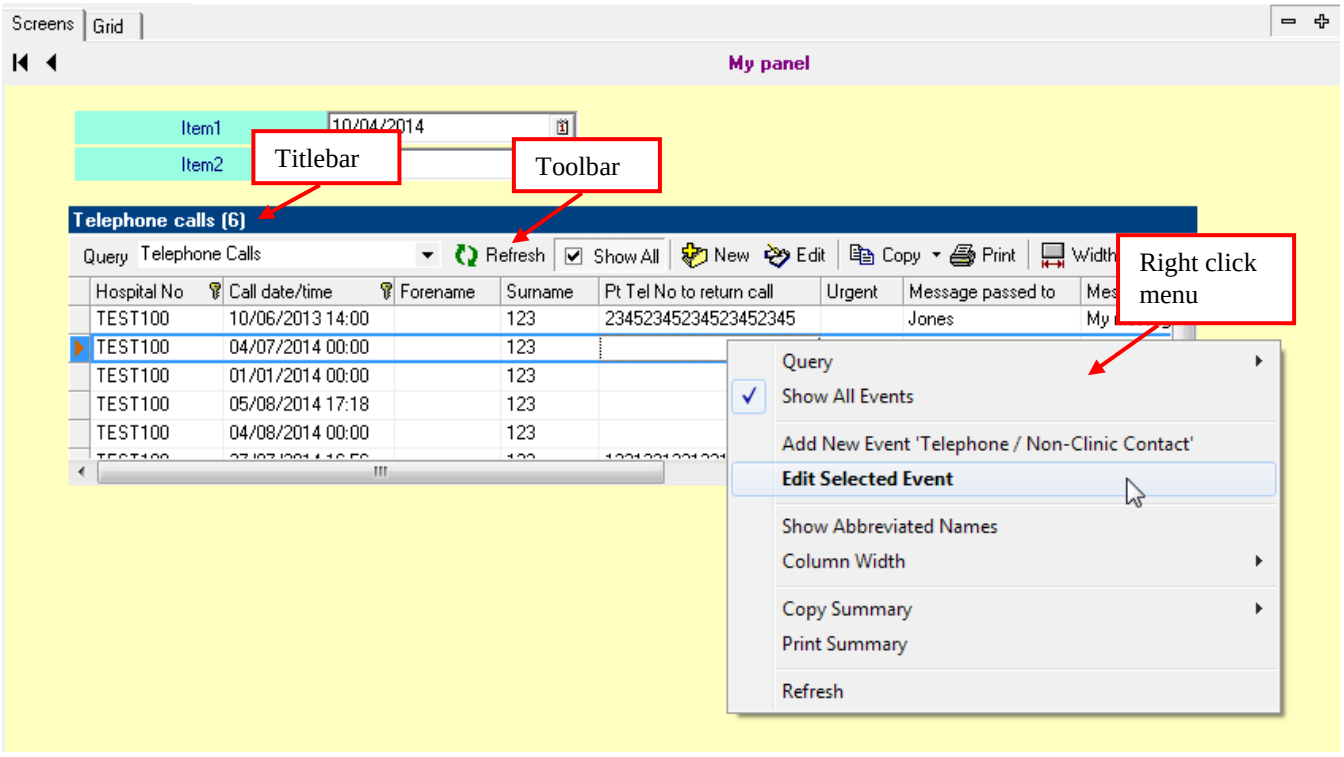
The titlebar is only displayed if there is text in the **Text** property in the panel layout. The titlebar displays the specified text and the record count. It is the only place a record count is displayed.

The toolbar is only displayed if the **Show Toolbar** property is set to **True** in the panel layout.

The **Show All button** is only available if the **Show All Events** property is set to **Optional** in the panel layout.

The **New** and **Edit** buttons are only available if **Can Create** and **Can Edit** are set to **True** respectively in the panel layout.

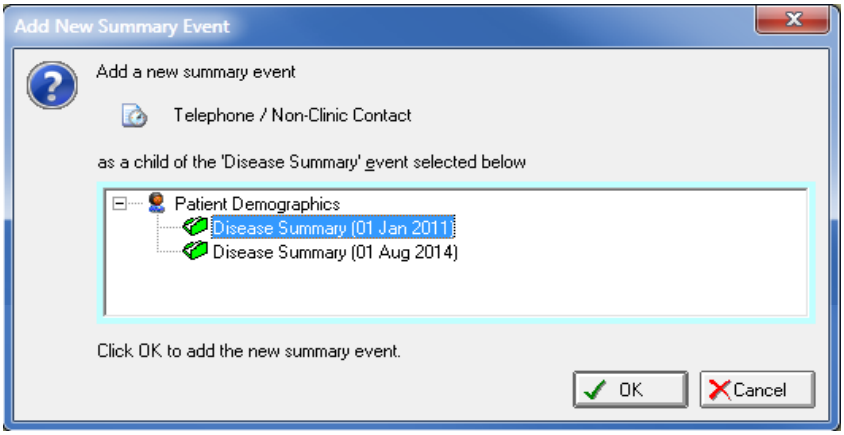
The **View** button is only available if **Can Edit** is set to **False** and **Can View** is set to **True** in the panel layout or if the Event View Summary does not allow editing.



Pressing **Refresh** causes the grid to refresh and any query prompts to be displayed.

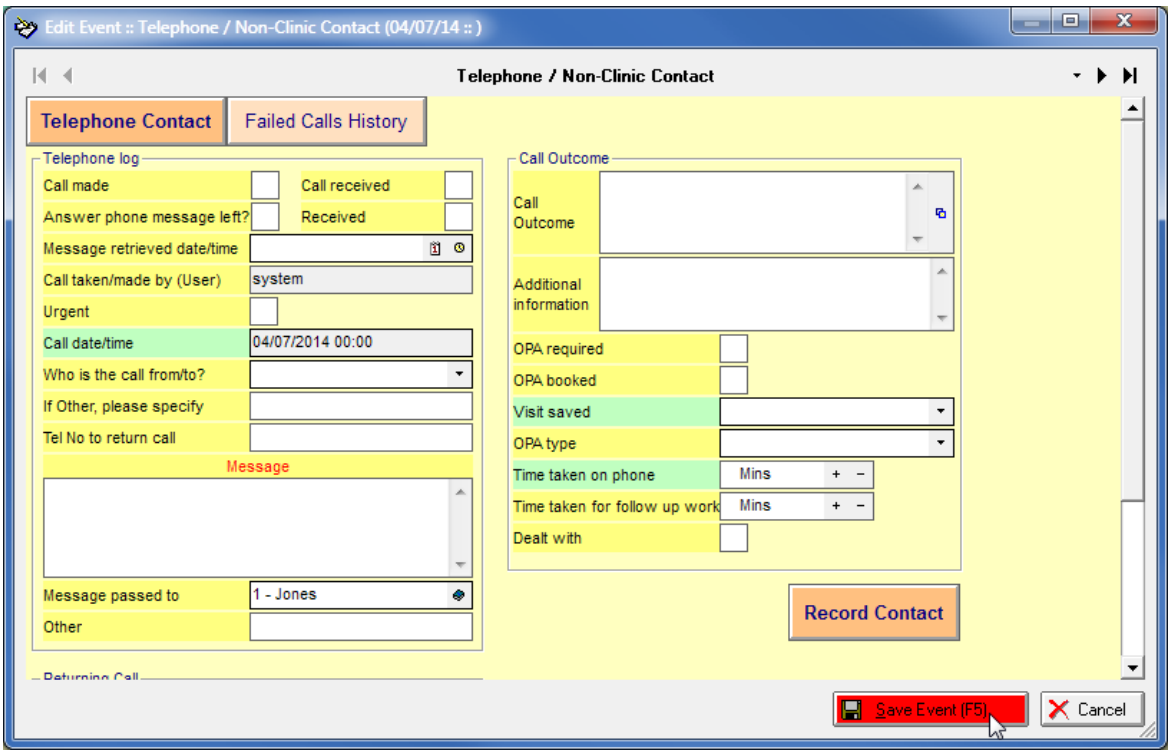
Press **Show All** to display all instances of the summarised event view for the current subject.

Press **New** to create a new instance of the summarised event view in a pop up window. If there are unsaved changes in the current event the user will be prompted to save. The user will then be prompted to select the parent event for the new instance.


Add New Summary Event
Add a new summary event
Telephone / Non-Clinic Contact
as a child of the 'Disease Summary' event selected below
Patient Demographics
Disease Summary (01 Jan 2011)
Disease Summary (01 Aug 2014)
Click OK to add the new summary event.
OK
Cancel

To view and edit the full instance of the summarised event in a pop up window, select a row and then press **Edit**. If there are unsaved changes in the current event the user will be prompted to save. On saving the pop up window, the grid automatically displays any changes any made.

If editing is not allowed, the **View** button displays the full instance of the summarised event in a read only pop up window.



Press **Copy** to copy the grid to the clipboard.

Press **Print** to print the grid.

Press **Width** to adjust the widths of the columns in the grid.